Government of Western Australia
Housing Authority

OPENING DOORS
To Affordable Housing

Support and Tenant Education Program Information Management System (STEPIMS)

User Guide – Housing Staff
Remote Indigenous Housing

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INTRODUCTION

What is STEPIMS?
The *Support and Tenant Education Program Information Management System* (STEPIMS) is a customised electronic case management system used to record and access details of STEP cases.

As STEPIMS is a web based system and can be accessed using a web browser, a live internet connection is required.

STEPIMS is optimised for Windows PCs using Internet Explorer 9 but will operate on other browsers i.e., Apple Mac systems, tablets and smartphones.

Access Levels
There are three different levels of access to STEPIMS for Service Providers:

- **Agency Case Enquiry** - read access only with no ability to update records – designed for STEP Provider Administration/Reception staff.
- **Agency Case Officer** – search, edit and update client records.
- **Agency Manager** – same as Agency Case Officer and in addition ability to access reports, edit user details and end user access, delete log comments and expected end dates.

There are four different levels of access to STEPIMS for the Department of Housing Staff:

- **Housing ICT** - create and edit user records with the ability to view reports
- **Housing Case Enquiry** – read access only with no ability to update records
- **Housing Officer** – search, add, edit client records
- **Housing Manager** – same as Housing Officer and in addition ability to approve referrals; access reports and manage user accounts
- **Administrator** – access to all functionality of STEPIMS

CONFIDENTIALITY OF INFORMATION

There is no legislative right to privacy in Western Australia and the *Housing Act 1980* does not create a duty of confidentiality between the Department of Housing and a customer. The Department, however, believes that it has a corporate responsibility to maintain the privacy and confidentiality of the tenants; hence the department follows the *National Privacy Principles* administered by the Office of The Australian Information Commissioner.

On this basis, the Department of Housing requires STEP Providers to enter into a confidentiality agreement prior to accessing STEPIMS. This is to ensure that personal information about the tenant is used only for the purposes of providing STEP assistance, managing the tenancy and to undertake program evaluation.

PASSWORD SECURITY

STEPIMS users should not disclose their password to anyone and should only use their own account to access the system. If you suspect that someone has obtained access to your password, contact the Department of Housing immediately to have your password changed.

If you have forgotten your username or password, or your password needs to be reset, contact the Department of Housing's IT Help Desk on 1300 791 022. Advise the Help Desk that you are an external user and provide the answer to your secret question to verify your identity.

LOGGING ON TO STEPIMS

Access to the STEPIMS is provided by the Department of Housing. New users will need to complete the *"STEPIMS Access Request"* form. This form includes the confidentiality agreement mentioned above and is available on the STEP web portal – Resources and Templates: http://www.housing.wa.gov.au/stepportal/pages/step.aspx.

STEPIMS has two main databases which can be accessed by STEP Providers:

- STEPIMS Training database and
- STEPIMS Production (live) database.

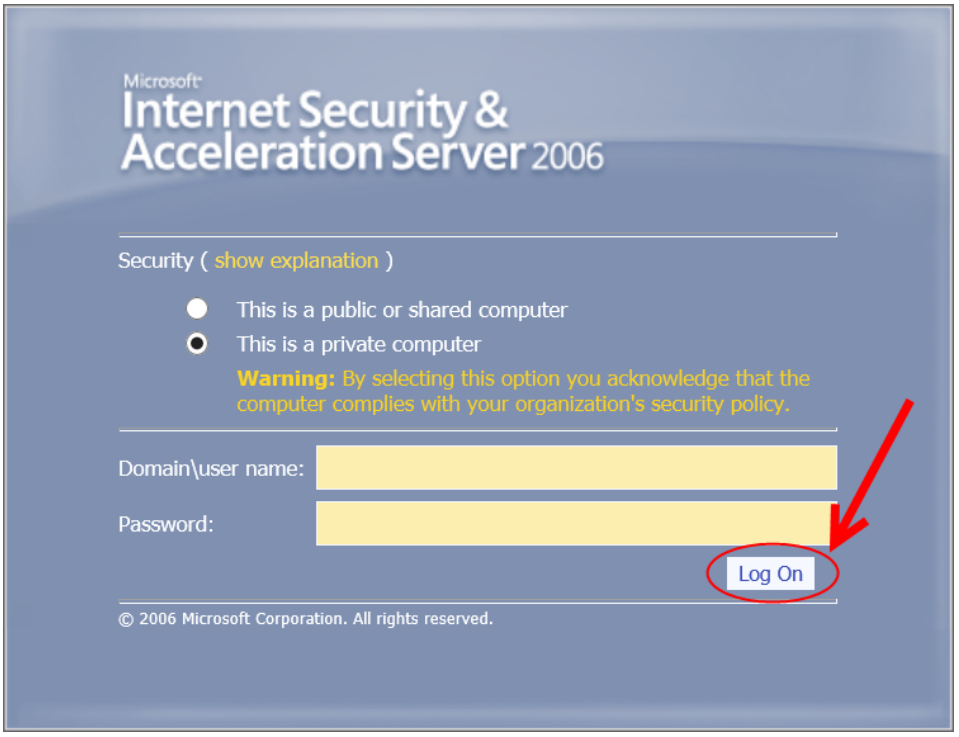
TRAINING AND PRODUCTION DATABASES

STEPIMS TRAINING is only for training and demonstration purposes. Do not enter real client details in this system. The link to STEPIMS TRAINING is: http://trainingstepims.housing.wa.gov.au

STEPIMS PRODUCTION is the live system used for actual cases. The link to STEPIMS PRODUCTION is: https://stepims.housing.wa.gov.au/default.aspx

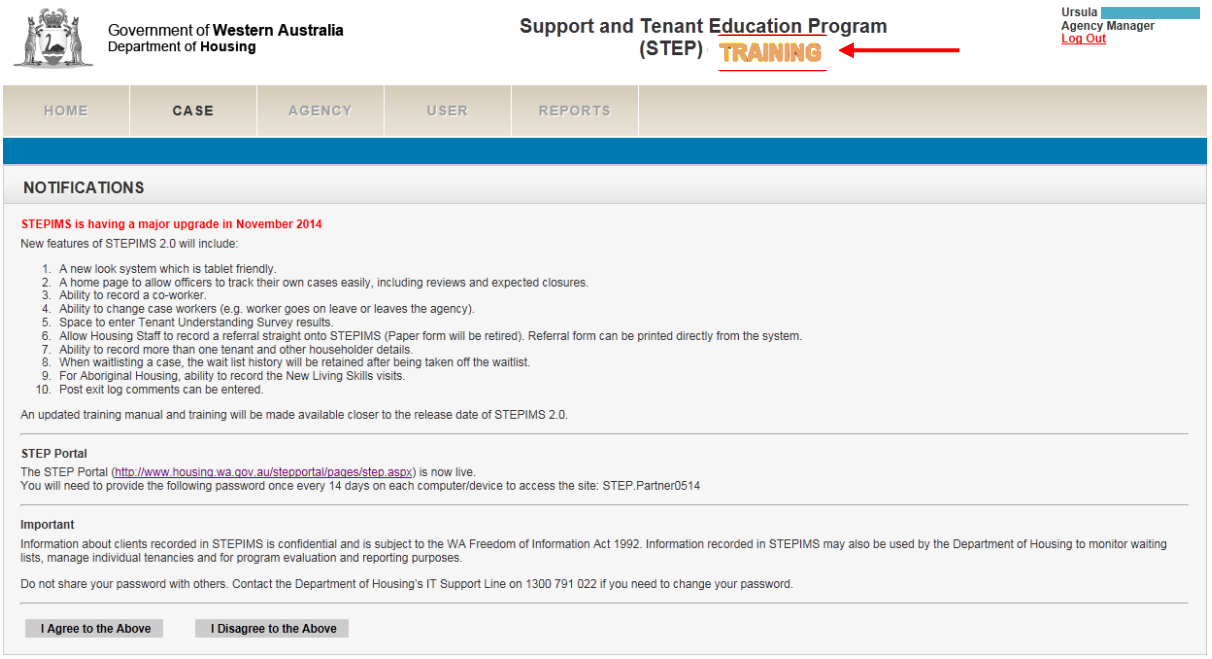
Log On Screen

When you access either of these databases in your web browser, the following screen will be displayed:


Microsoft
Internet Security & Acceleration Server 2006
Security (show explanation)
This is a public or shared computer
This is a private computer
Warning: By selecting this option you acknowledge that the computer complies with your organization's security policy.
Domain\user name:
Password:
Log On
© 2006 Microsoft Corporation. All rights reserved.

Enter your username and password and click the Log On button. You will then be taken to the Notifications screen.

Notifications Screen


Government of Western Australia
Department of Housing
Support and Tenant Education Program
(STEP) TRAINING
Ursula
Agency Manager
Log Out
HOME
CASE
AGENCY
USER
REPORTS
NOTIFICATIONS
STEPIMS is having a major upgrade in November 2014
New features of STEPIMS 2.0 will include:
1. A new look system which is tablet friendly.
2. A home page to allow officers to track their own cases easily, including reviews and expected closures.
3. Ability to record a co-worker.
4. Ability to change case workers (e.g. worker goes on leave or leaves the agency).
5. Space to enter Tenant Understanding Survey results.
6. Allow Housing Staff to record a referral straight onto STEPIMS (Paper form will be retired). Referral form can be printed directly from the system.
7. Ability to record more than one tenant and other householder details.
8. When waitlisting a case, the wait list history will be retained after being taken off the waitlist.
9. For Aboriginal Housing, ability to record the New Living Skills visits.
10. Post exit log comments can be entered.
An updated training manual and training will be made available closer to the release date of STEPIMS 2.0.
STEP Portal
The STEP Portal (http://www.housing.wa.gov.au/stepportal/pages/step.aspx) is now live.
You will need to provide the following password once every 14 days on each computer/device to access the site: STEP.Partner0514
Important
Information about clients recorded in STEPIMS is confidential and is subject to the WA Freedom of Information Act 1992. Information recorded in STEPIMS may also be used by the Department of Housing to monitor waiting lists, manage individual tenancies and for program evaluation and reporting purposes.
Do not share your password with others. Contact the Department of Housing's IT Support Line on 1300 791 022 if you need to change your password.
I Agree to the Above
I Disagree to the Above

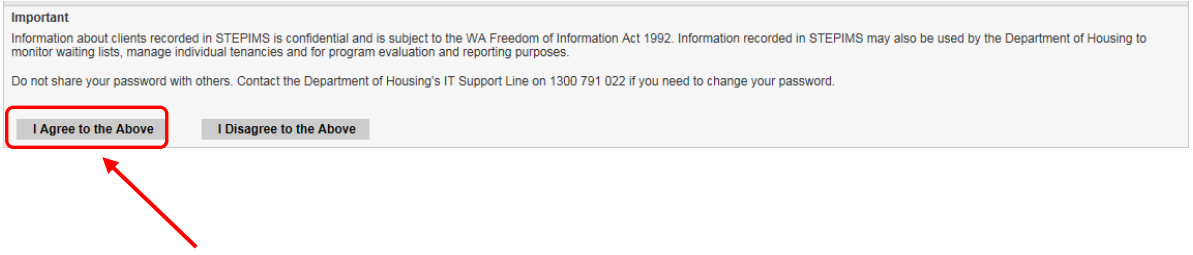
Important *– You can confirm you are in the right database by checking that the word "TRAINING" is displayed in the banner.*

The Notifications screen contains information about upcoming system maintenance and an acknowledgement and reminder screen about client confidentiality and password security.

The acknowledgement and reminder message:

> *Important*
>
> *Information about clients recorded in STEPIMS is confidential, but is subject to the WA Freedom of Information Act 1992. Information recorded in STEPIMS may also be used by the Department of Housing to monitor waiting lists, manage individual tenancies and for program evaluation and reporting purposes.*
>
> *Do not share your password with others. Contact the Department of Housing's IT Support Line on 1300 791 022 if you need to change your password.*

Click on the '*I Agree to the Above'* button to proceed to the *Home* page:


Important
Information about clients recorded in STEPIMS is confidential and is subject to the WA Freedom of Information Act 1992. Information recorded in STEPIMS may also be used by the Department of Housing to monitor waiting lists, manage individual tenancies and for program evaluation and reporting purposes.
Do not share your password with others. Contact the Department of Housing's IT Support Line on 1300 791 022 if you need to change your password.
I Agree to the Above
I Disagree to the Above

HOME PAGE

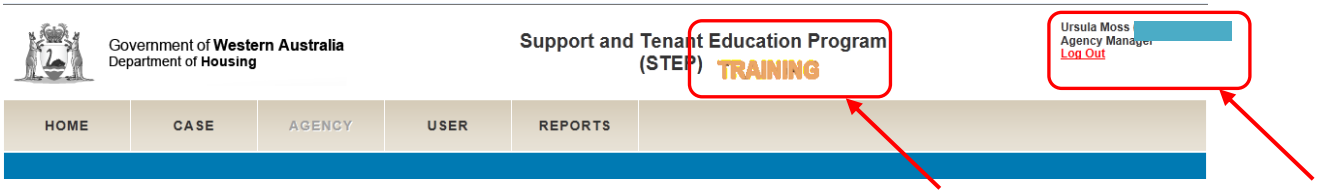
The *Home* page display will vary depending on the level of user access and the availability of some menu options that may be restricted. Details of the various *Home p*age displays will be provided when explaining each user access level.

General Information that is displayed on all *Home* pages is explained below:

Display Information – Agency, Database and User Details
The middle area at the top of the screen indicates that you are in the TRAINING database. Please note there is no label displayed in the PRODUCTION database.

The top right area of the screen shows:

- Your Log On ID
- Your name
- Your access level
- A Log Out button



General Navigation
In the top grey banner of the screen, the Menu options display. You can view/edit/add new cases depending on the access level that has been set up for you. If you do not have access to a functionality it will be "greyed out".

The options are:

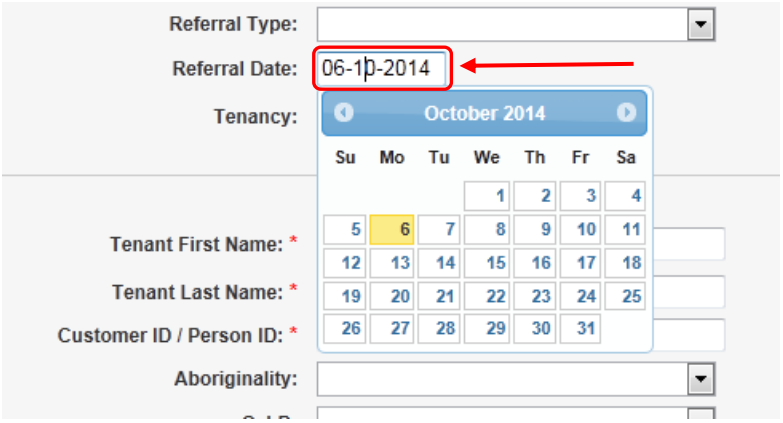
Menu Option	Details
Home	Displays summary information about cases in the system.
Case	There are two options. **Case - Search** allows the user to search for cases. A range of search criteria can be used i.e., case status, cases managed by a specific case worker etc. From the search results, the user can view details of a case and update records (e.g. record home visits, review meetings etc.).
	Case – Add New is available to users with Housing Officer and Housing Manager access.
Agency	Available to users with Administrator access and Housing ICT access.
User	Available to users with the following access: • Administrator • Housing ICT • Housing Manager • Agency Manager Enables the above users to edit details and disable user accounts.
Reports	Available to users with Agency Manager or Housing Manager access. Allows the Manager to run various reports.

Mandatory Fields

Fields marked with a red asterisk * are mandatory fields that must be completed before you can save a record.

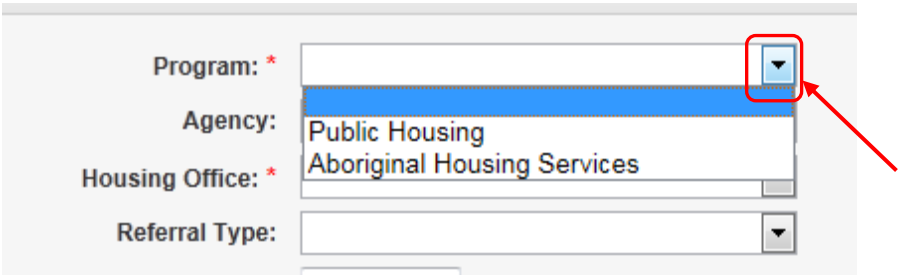
Date Fields

Date fields (such as the Referral Date) can be completed either by typing in the date such as 21-10-2014 (DD-MM-YYYY format) or you can click in the field to display a calendar to choose the date.



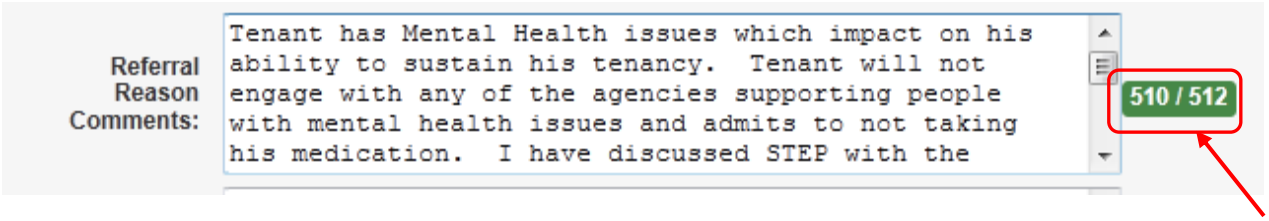
Drop Down Lists

Fields ending in this symbol provide a drop down list of options. Fields without the drop down symbol are mostly free text or date fields.



Large Text Fields

Large text fields display the number of characters used and available to the right or underneath each field and will update as you type.


Referral Reason Comments:
Tenant has Mental Health issues which impact on his ability to sustain his tenancy. Tenant will not engage with any of the agencies supporting people with mental health issues and admits to not taking his medication. I have discussed STEP with the
510 / 512

If you go over the character limit, the character count field turns from green to red. You will not be able to save until you reduce the number of characters to the stated limit or less.

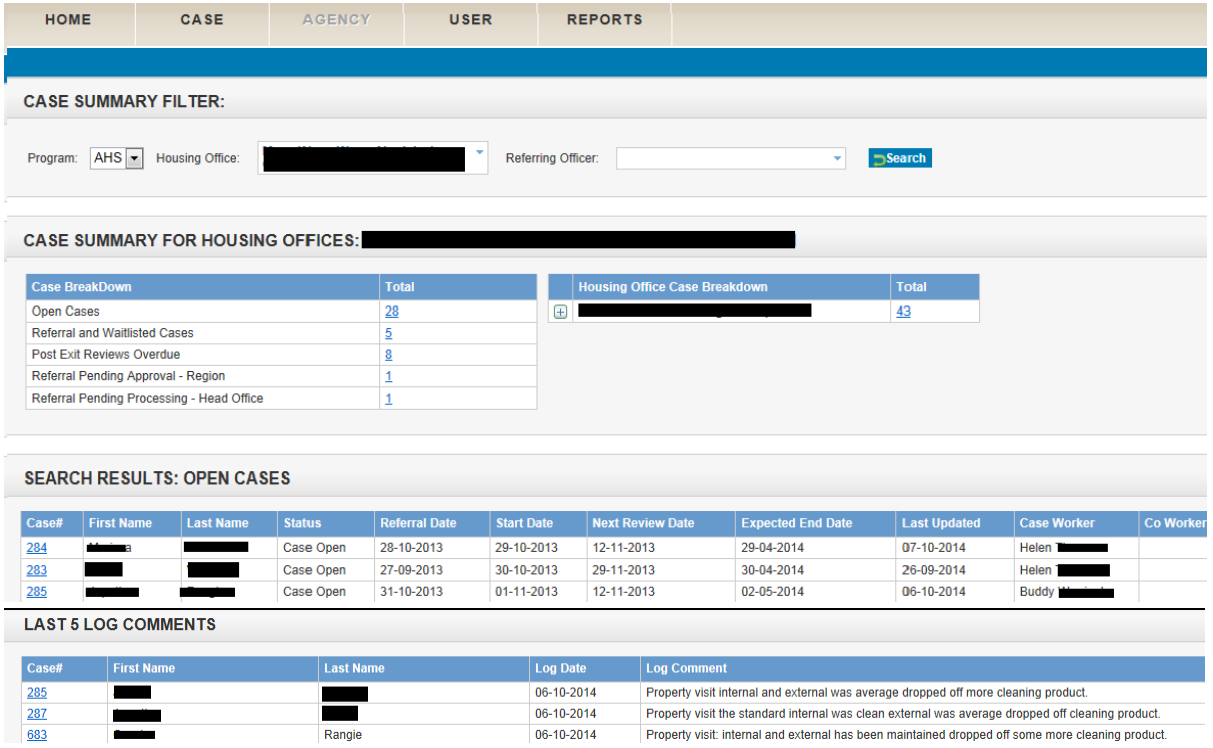
HOUSING MANAGER ACCESS

Users with *Housing Manager* access can search, add, edit client records and in addition the ability to approve referrals, access reports and manage user accounts.

HOME – Menu Option

For users with *Housing Manager* access the *Home* page displays the following:

Home Page

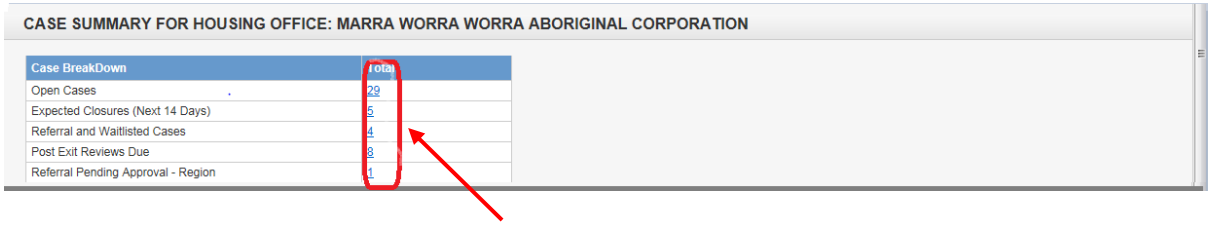

HOME
CASE
AGENCY
USER
REPORTS
CASE SUMMARY FILTER:
Program: AHS
Housing Office:
Referring Officer:
Search
CASE SUMMARY FOR HOUSING OFFICES:
Case BreakDown
Total
Open Cases 28
Referral and Waitlisted Cases 5
Post Exit Reviews Overdue 8
Referral Pending Approval - Region 1
Referral Pending Processing - Head Office 1
Housing Office Case Breakdown
Total
43
SEARCH RESULTS: OPEN CASES
Case# First Name Last Name Status Referral Date Start Date Next Review Date Expected End Date Last Updated Case Worker Co Worker
284 Case Open 28-10-2013 29-10-2013 12-11-2013 29-04-2014 07-10-2014 Helen
283 Case Open 27-09-2013 30-10-2013 29-11-2013 30-04-2014 26-09-2014 Helen
285 Case Open 31-10-2013 01-11-2013 12-11-2013 02-05-2014 06-10-2014 Buddy
LAST 5 LOG COMMENTS
Case# First Name Last Name Log Date Log Comment
285 06-10-2014 Property visit internal and external was average dropped off more cleaning product.
287 06-10-2014 Property visit the standard internal was clean external was average dropped off cleaning product.
683 Rangie 06-10-2014 Property visit: internal and external has been maintained dropped off some more cleaning product.

Case Summary Filter:

The *Case Summary Filter* allows the Housing Officer to view cases from a list of Housing Offices where applicable.

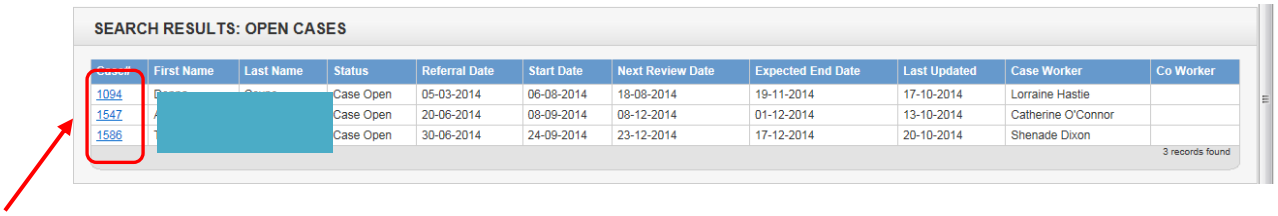
Case Summary for Housing Office:

The *Case Summary for Housing Office* section displays the No. of Cases. To view these cases click on the number in the *Total* column.


CASE SUMMARY FOR HOUSING OFFICE: MARRA WORRA WORRA ABORIGINAL CORPORATION
Case BreakDown
Total
Open Cases 29
Expected Closures (Next 14 Days) 5
Referral and Waitlisted Cases 4
Post Exit Reviews Due 8
Referral Pending Approval - Region 1

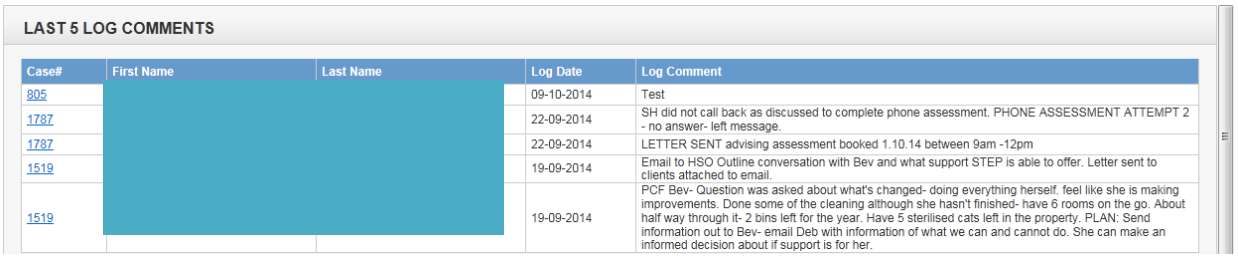
Search Results

The *Search Results* section displays details of the cases. To open a case, click on the *Case #*

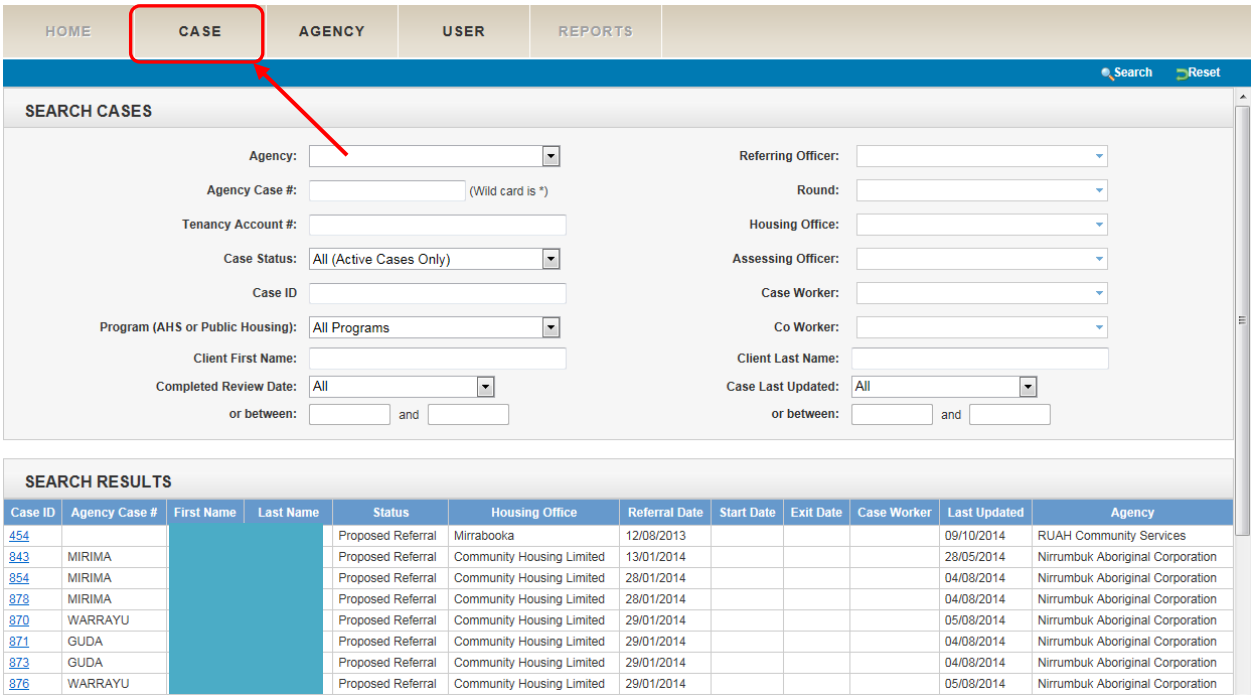

SEARCH RESULTS: OPEN CASES
Case# First Name Last Name Status Referral Date Start Date Next Review Date Expected End Date Last Updated Case Worker Co Worker
1094 Case Open 05-03-2014 06-08-2014 18-08-2014 19-11-2014 17-10-2014 Lorraine Hastie
1547 Case Open 20-06-2014 08-09-2014 08-12-2014 01-12-2014 13-10-2014 Catherine O'Connor
1586 Case Open 30-06-2014 24-09-2014 23-12-2014 17-12-2014 20-10-2014 Shenade Dixon
3 records found

Last 5 Log Comments

The Last 5 Log Comments made to cases are displayed in this area.


LAST 5 LOG COMMENTS
Case# First Name Last Name Log Date Log Comment
805 09-10-2014 Test
1787 22-09-2014 SH did not call back as discussed to complete phone assessment. PHONE ASSESSMENT ATTEMPT 2 - no answer- left message.
1787 22-09-2014 LETTER SENT advising assessment booked 1.10.14 between 9am -12pm
1519 19-09-2014 Email to HSO Outline conversation with Bev and what support STEP is able to offer. Letter sent to clients attached to email.
1519 19-09-2014 PCF Bev- Question was asked about what's changed- doing everything herself. feel like she is making improvements. Done some of the cleaning although she hasn't finished- have 6 rooms on the go. About half way through it- 2 bins left for the year. Have 5 sterilised cats left in the property. PLAN: Send information out to Bev- email Deb with information of what we can and cannot do. She can make an informed decision about if support is for her.

CASE – Menu Option


HOME
CASE
AGENCY
USER
REPORTS
Search
Reset
SEARCH CASES
Agency:
Agency Case #:
(Wild card is *)
Tenancy Account #:
Case Status:
All (Active Cases Only)
Case ID
Program (AHS or Public Housing):
All Programs
Client First Name:
Completed Review Date:
All
or between:
and
Referring Officer:
Round:
Housing Office:
Assessing Officer:
Case Worker:
Co Worker:
Client Last Name:
Case Last Updated:
All
or between:
and
SEARCH RESULTS
Case ID | Agency Case # | First Name | Last Name | Status | Housing Office | Referral Date | Start Date | Exit Date | Case Worker | Last Updated | Agency
454 | | | | Proposed Referral | Mirrabooka | 12/08/2013 | | | | 09/10/2014 | RUAH Community Services
843 | MIRIMA | | | Proposed Referral | Community Housing Limited | 13/01/2014 | | | | 28/05/2014 | Nirrumbuk Aboriginal Corporation
854 | MIRIMA | | | Proposed Referral | Community Housing Limited | 28/01/2014 | | | | 04/08/2014 | Nirrumbuk Aboriginal Corporation
878 | MIRIMA | | | Proposed Referral | Community Housing Limited | 28/01/2014 | | | | 04/08/2014 | Nirrumbuk Aboriginal Corporation
870 | WARRAYU | | | Proposed Referral | Community Housing Limited | 29/01/2014 | | | | 05/08/2014 | Nirrumbuk Aboriginal Corporation
871 | GUDA | | | Proposed Referral | Community Housing Limited | 29/01/2014 | | | | 04/08/2014 | Nirrumbuk Aboriginal Corporation
873 | GUDA | | | Proposed Referral | Community Housing Limited | 29/01/2014 | | | | 04/08/2014 | Nirrumbuk Aboriginal Corporation
876 | WARRAYU | | | Proposed Referral | Community Housing Limited | 29/01/2014 | | | | 05/08/2014 | Nirrumbuk Aboriginal Corporation

Case – Search

This option allows you to search for cases. You can go directly from the *Search Results* area into the client details screen.

To search, you can enter details in a number of fields and make selections from the drop-down options.

Search criteria may be entered in the following fields:

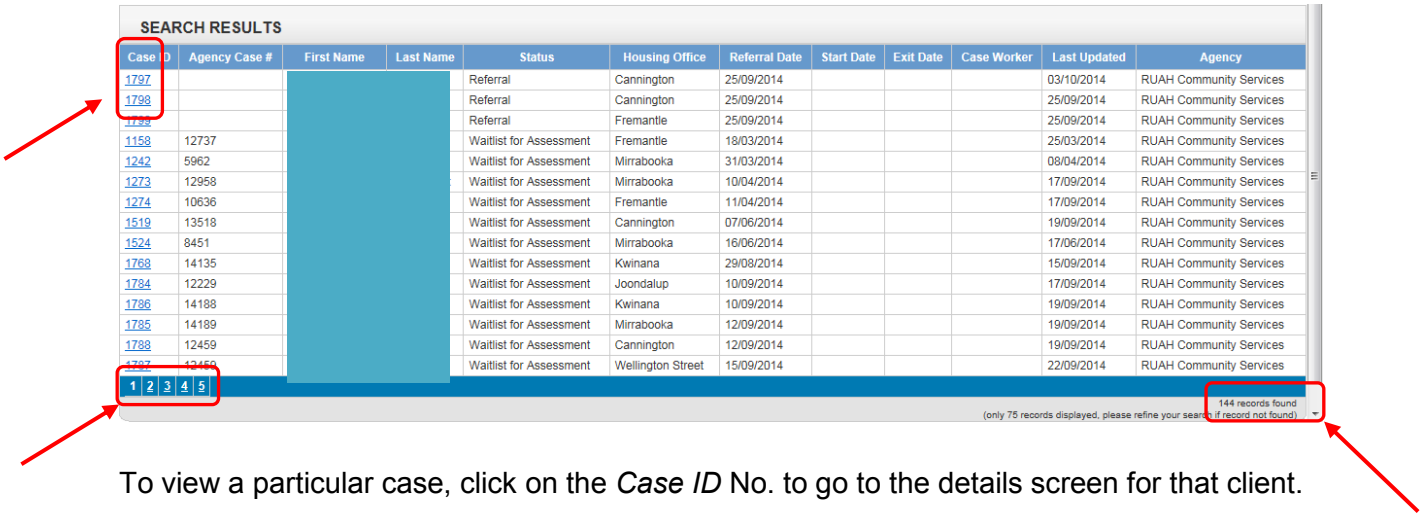
- *Agency Case #*
- *Tenancy Account #*
- *Case ID*
- *Client First Name*
- *Client Last Name*

Search criteria may be selected from the following drop-down options:

- *Agency*: this field automatically defaults to your agency
- *Case Status*:
  - *All (Active Case Only)*
  - *All (Include Closed/Withdrawn Cases)*
  - *Referral*
  - *Ended at Referral Stage*
  - *Waitlist for Assessment*

    - *Under Assessment*
    - *Ended at Assessment Stage*
    - *Waitlisted*
    - *Case Open*
    - *Case Terminated Early*
    - *Case Closed*
- *Program (AHS or Public Housing)*
    - *All Programs*
    - *Public Housing*
    - *Aboriginal Housing Services*
- *Complete Review Date:*
    - *All*
    - *In Last 10 Days*
    - *In Last 30 Days*
    - *Custom* - select a date range
- *Referring Officer* – Choose from List of Names of Housing Officers or the option to check all officers is available
- *Round* – Choose from a list of Housing Office Round Numbers (A Round is a group of houses covered by a Housing Services Officer – *DOH Direct Managed only)*
- *Housing Office* – Choose from a List of Housing Offices or the option to check all offices is available
- *Assessing Officer* - Choose from List of Assessing Officers or the option to check all officers is available
- *Case Worker* - Choose from List of Case Workers or the option to check all officers is available
- *Co Worker* – Choose from List of Co Workers or the option to check all officers is available
- *Case Last Updated*
    - *All*
    - *In Last 10 Days*
    - *In Last 30 Days*
    - *Custom* - select a date range

A search may be narrowed by completing as much of the Search Criteria as possible. The results are displayed in the *Search Results* section and are listed in *Status* order (i.e. Referral; Waitlist for Assessment etc).


SEARCH RESULTS
Case ID
Agency Case #
First Name
Last Name
Status
Housing Office
Referral Date
Start Date
Exit Date
Case Worker
Last Updated
Agency
1797 Referral Cannington 25/09/2014 03/10/2014 RUAH Community Services
1798 Referral Cannington 25/09/2014 25/09/2014 RUAH Community Services
Referral Fremantle 25/09/2014 25/09/2014 RUAH Community Services
1158 12737 Waitlist for Assessment Fremantle 18/03/2014 25/03/2014 RUAH Community Services
1242 5962 Waitlist for Assessment Mirrabooka 31/03/2014 08/04/2014 RUAH Community Services
1273 12958 Waitlist for Assessment Mirrabooka 10/04/2014 17/09/2014 RUAH Community Services
1274 10636 Waitlist for Assessment Fremantle 11/04/2014 17/09/2014 RUAH Community Services
1519 13518 Waitlist for Assessment Cannington 07/06/2014 19/09/2014 RUAH Community Services
1524 8451 Waitlist for Assessment Mirrabooka 16/06/2014 17/06/2014 RUAH Community Services
1768 14135 Waitlist for Assessment Kwinana 29/08/2014 15/09/2014 RUAH Community Services
1784 12229 Waitlist for Assessment Joondalup 10/09/2014 17/09/2014 RUAH Community Services
1786 14188 Waitlist for Assessment Kwinana 10/09/2014 19/09/2014 RUAH Community Services
1785 14189 Waitlist for Assessment Mirrabooka 12/09/2014 19/09/2014 RUAH Community Services
1788 12459 Waitlist for Assessment Cannington 12/09/2014 19/09/2014 RUAH Community Services
Waitlist for Assessment Wellington Street 15/09/2014 22/09/2014 RUAH Community Services
1 2 3 4 5
144 records found
(only 75 records displayed, please refine your search if record not found)

To view a particular case, click on the *Case ID* No. to go to the details screen for that client.

Information on the *Case Details* screen is covered in a later section of this guide.

The number(s) in the bottom left corner of the screen (in the blue banner) indicates the number of pages found; 15 records per page are displayed at a time. The number in the bottom right corner of the screen (in the grey banner) shows the total number of cases that met the search criteria.

Hint: The *Reset* button removes any existing search criteria so you can start again.

Note: By default, inactive cases (clients who have exited the program and referrals that were withdrawn/not accepted) do not display in the *Search Results* unless the "*All (Include Closed/Withdrawn Cases)"* is selected from the *Case Status* drop-down option.

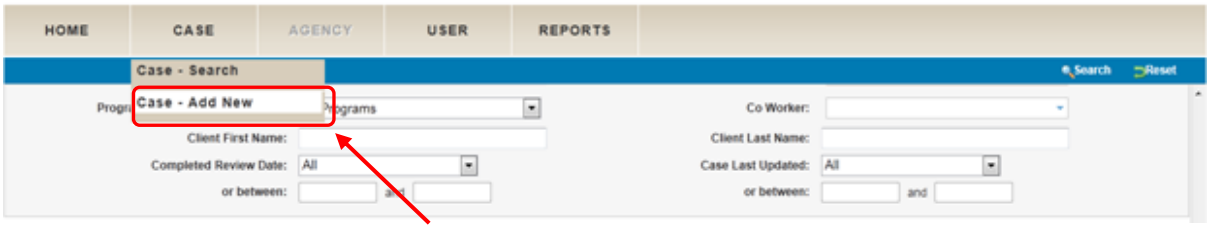
CASE – Add New

All referrals to STEP are now entered directly onto STEPIMS by Housing staff only.

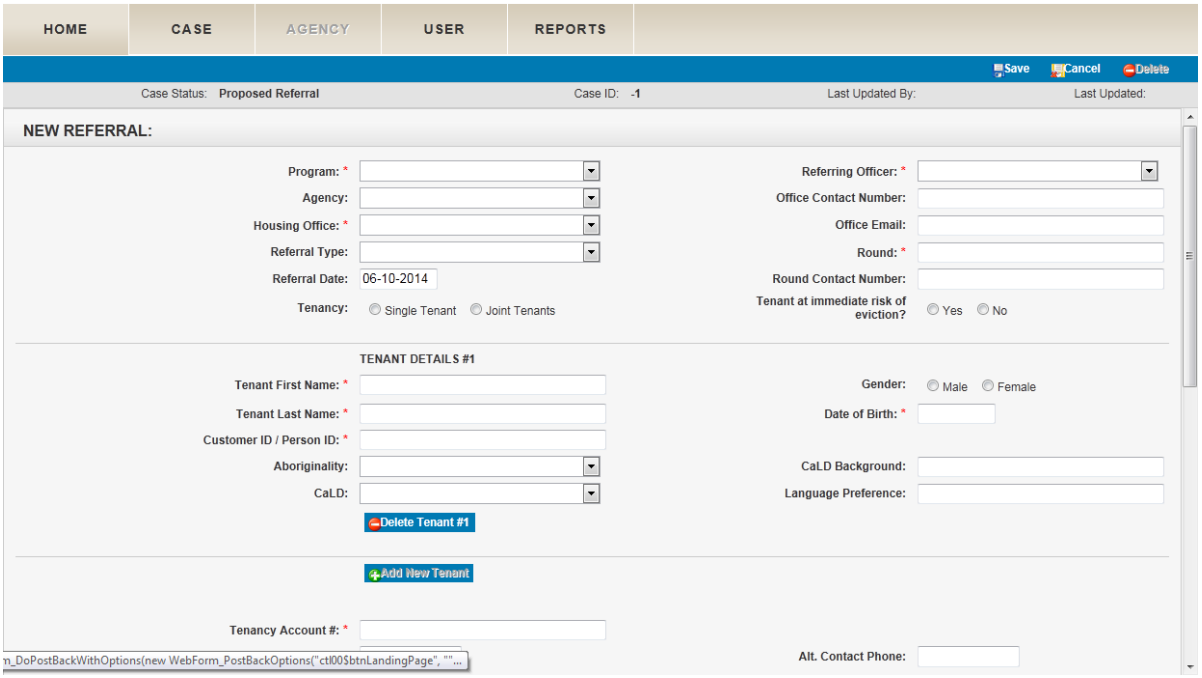
Paper referrals will no longer be processed.

After you have logged in to the **STEPIMS Production (live)** database and the *Home* page displays click on ***Case*** and then ***Case – Add New*** as shown below.

The *Case – Add New* menu option allows you to create a referral in STEPIMS. Click on the *Case – Add New* link.



The New Referral screen displays.



Menu Bar

The area in the top blue banner will look like this:

There are buttons in the top right:

Button	Function
Save	Click the Save button to save your work. A message in green font will display for a few seconds at the bottom of the screen if the save was successful: *Case was successfully saved.*
Cancel	Click the Cancel button to reset the data fields to how they were when the case was last saved. You will get a pop up box asking you to confirm you wish to cancel the changes you have made. If you proceed, a message in green font will display for a few seconds at the bottom of your screen if the save was successful: *Case changes cancelled and screen refreshed successfully!*

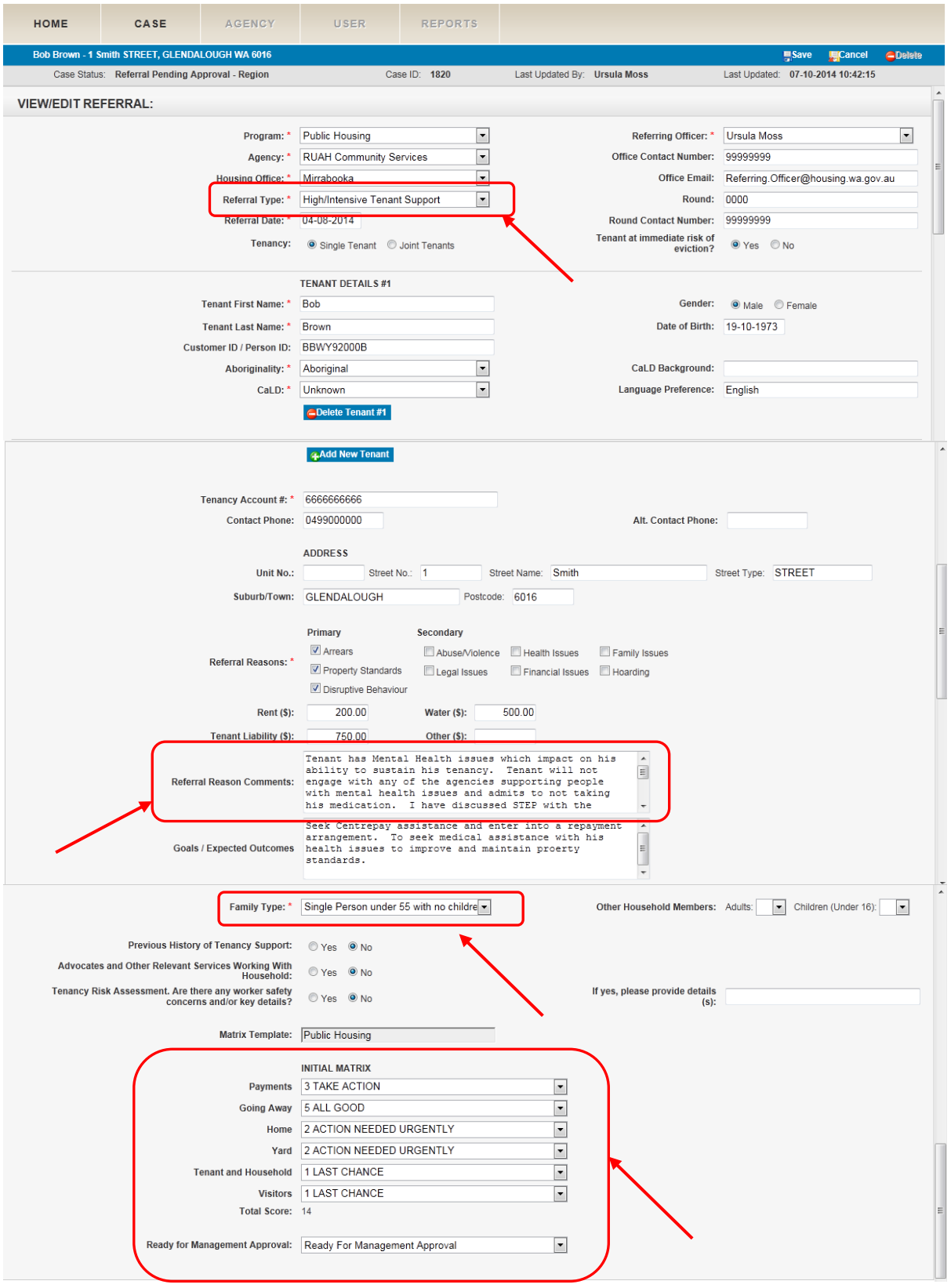
Delete	This function is only available to Agency Managers. If you have entered a case into the system by accident (e.g. put in the same referral twice), ask an officer with Agency Manager access (or email the AHS STEPIMS Administrator at ahs-ptm@housing.wa.gov.au) to delete the case in question.

The grey banner contains four fields:

Field	Details
Case Status	This field shows the status of the case and will update as you save a record.
Case ID	This is a unique number allocated to each case. The ID will be -1 until a case is successfully saved.
Last Updated By	This displays the name of the user who last updated the record.
Last Updated	This displays the date and time the record was last saved.

New Referral

When a tenant has been identified as a suitable STEP client, the Referring Officer will complete the *Referral* section (You will select Aboriginal Housing *(not Public Housing)* in the drop down menu).


HOME
CASE
AGENCY
USER
REPORTS
Bob Brown - 1 Smith STREET, GLENDALOUGH WA 6016
Save
Cancel
Delete
Case Status: Referral Pending Approval - Region
Case ID: 1820
Last Updated By: Ursula Moss
Last Updated: 07-10-2014 10:42:15
VIEW/EDIT REFERRAL:
Program: * Public Housing
Agency: * RUAH Community Services
Housing Office: * Mirrabooka
Referral Type: * High/Intensive Tenant Support
Referral Date: * 04-08-2014
Tenancy: Single Tenant Joint Tenants
Referring Officer: * Ursula Moss
Office Contact Number: 99999999
Office Email: Referring.Officer@housing.wa.gov.au
Round: 0000
Round Contact Number: 99999999
Tenant at immediate risk of eviction? Yes No
TENANT DETAILS #1
Tenant First Name: * Bob
Tenant Last Name: * Brown
Customer ID / Person ID: BBWY92000B
Aboriginality: * Aboriginal
CaLD: * Unknown
Gender: Male Female
Date of Birth: 19-10-1973
CaLD Background:
Language Preference: English
Delete Tenant #1
Add New Tenant
Tenancy Account #: * 6666666666
Contact Phone: 0499000000
Alt. Contact Phone:
ADDRESS
Unit No.:
Street No.: 1
Street Name: Smith
Street Type: STREET
Suburb/Town: GLENDALOUGH
Postcode: 6016
Referral Reasons: *
Primary
Arrears
Property Standards
Disruptive Behaviour
Secondary
Abuse/Violence
Legal Issues
Health Issues
Financial Issues
Family Issues
Hoarding
Rent ($): 200.00
Water ($): 500.00
Tenant Liability ($): 750.00
Other ($):
Referral Reason Comments:
Tenant has Mental Health issues which impact on his ability to sustain his tenancy. Tenant will not engage with any of the agencies supporting people with mental health issues and admits to not taking his medication. I have discussed STEP with the
Goals / Expected Outcomes
Seek Centrepay assistance and enter into a repayment arrangement. To seek medical assistance with his health issues to improve and maintain proerty standards.
Family Type: * Single Person under 55 with no childre
Other Household Members: Adults: Children (Under 16):
Previous History of Tenancy Support: Yes No
Advocates and Other Relevant Services Working With Household: Yes No
Tenancy Risk Assessment. Are there any worker safety concerns and/or key details? Yes No
If yes, please provide details (s):
Matrix Template: Public Housing
INITIAL MATRIX
Payments 3 TAKE ACTION
Going Away 5 ALL GOOD
Home 2 ACTION NEEDED URGENTLY
Yard 2 ACTION NEEDED URGENTLY
Tenant and Household 1 LAST CHANCE
Visitors 1 LAST CHANCE
Total Score: 14
Ready for Management Approval: Ready For Management Approval

Referral Types

The *Referral Types* are:

- *New Living Skills*
- *Housing Applicant*
- *Education/Early Intervention*
- *Tenant Support*
- *High/Intensive Tenant Support*

The *Referral Reasons* area will display a number of *Primary* and *Secondary* tick boxes based on the selected *Referral Type*. At least one of the *Primary* boxes must be ticked. For example a '*Tenant Support'* or '*High/Intensive Tenant Support'* referral will display the following Primary boxes:

- *Arrears*
- *Property Standards*
- *Disruptive Behaviour*

Note: Once the Referral Reason(s) have been entered you are able to save the record. An error message will pop up if any details are missing or have not been completed.

The *Referral Reason Comments* text box is used to provide further details about the referral i.e. 'Tony has been issued with one strike for disruptive behaviour caused by extended family making a noise late at night and hassling the neighbours and visitors to nearby units.

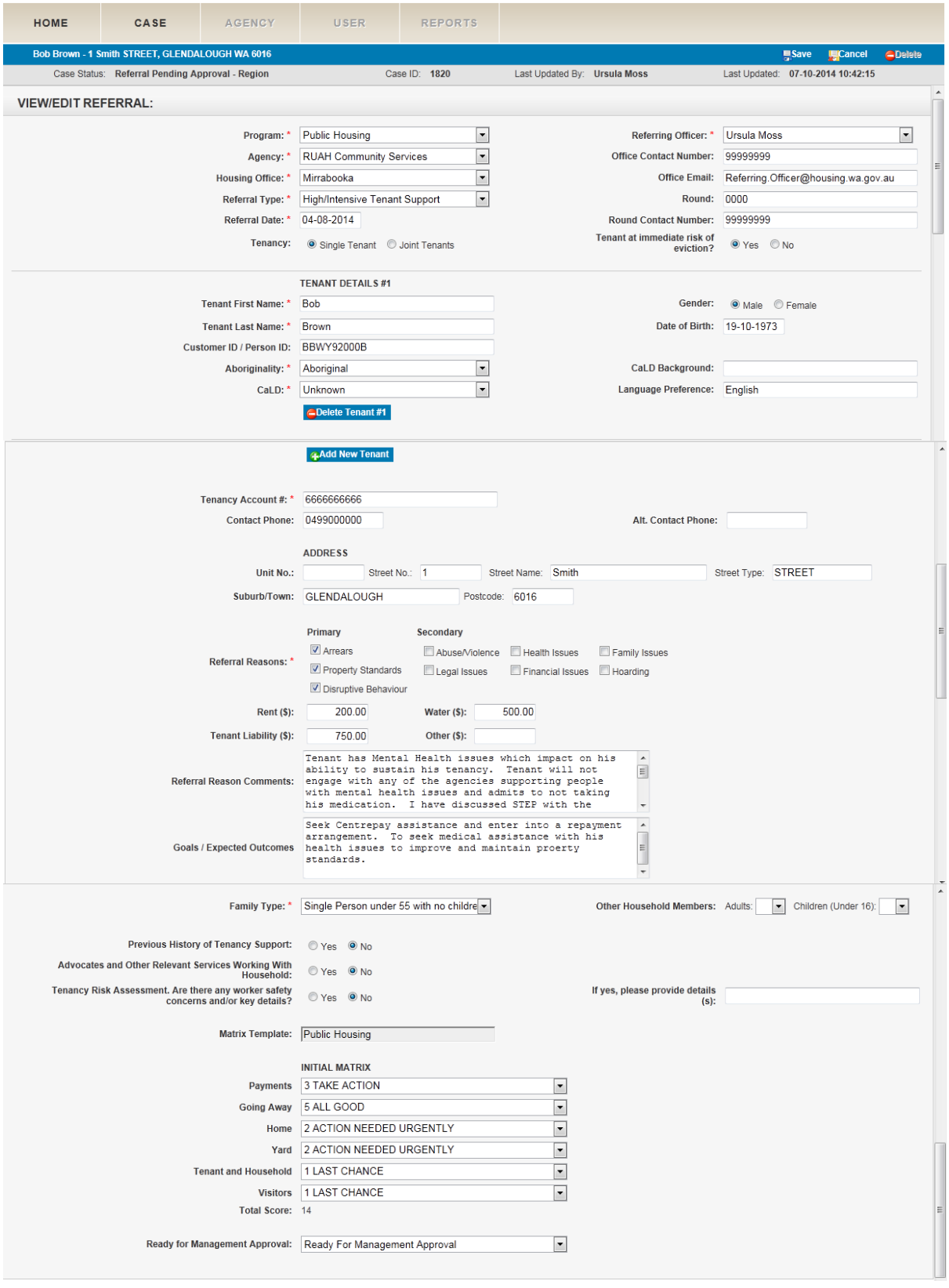
When all the information has been entered, the form needs to be approved.

Select the *Ready for Management Approval* box and save the record (see below).

A Case ID No. is automatically generated and the referral is electronically passed to the Regional Team Leader/Manager for approval.

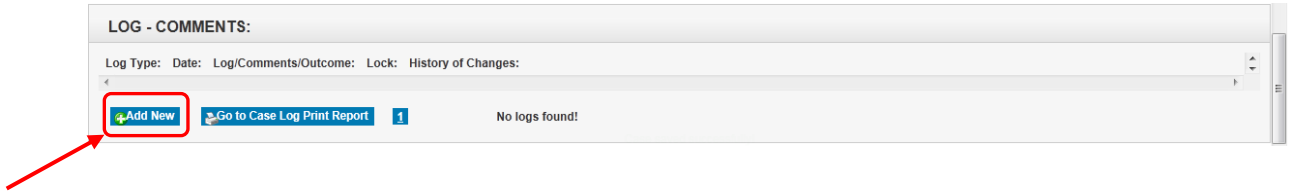
Example of a Completed Referral

NOTE: You will have selected Aboriginal Housing (and not Public Housing) in the first Program drop down menu.

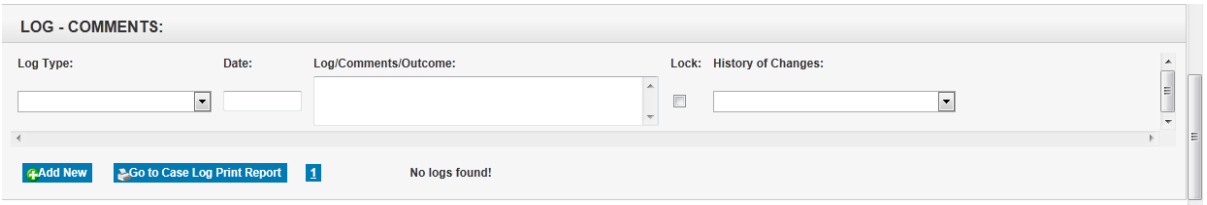

HOME
CASE
AGENCY
USER
REPORTS
Bob Brown - 1 Smith STREET, GLENDALOUGH WA 6016
Save
Cancel
Delete
Case Status: Referral Pending Approval - Region
Case ID: 1820
Last Updated By: Ursula Moss
Last Updated: 07-10-2014 10:42:15
VIEW/EDIT REFERRAL:
Program: * Public Housing
Agency: * RUAH Community Services
Housing Office: * Mirrabooka
Referral Type: * High/Intensive Tenant Support
Referral Date: * 04-08-2014
Tenancy: Single Tenant Joint Tenants
Referring Officer: * Ursula Moss
Office Contact Number: 99999999
Office Email: Referring.Officer@housing.wa.gov.au
Round: 0000
Round Contact Number: 99999999
Tenant at immediate risk of eviction? Yes No
TENANT DETAILS #1
Tenant First Name: * Bob
Tenant Last Name: * Brown
Customer ID / Person ID: BBWY92000B
Aboriginality: * Aboriginal
CaLD: * Unknown
Gender: Male Female
Date of Birth: 19-10-1973
CaLD Background:
Language Preference: English
Delete Tenant #1
Add New Tenant
Tenancy Account #: * 6666666666
Contact Phone: 0499000000
Alt. Contact Phone:
ADDRESS
Unit No.:
Street No.: 1
Street Name: Smith
Street Type: STREET
Suburb/Town: GLENDALOUGH
Postcode: 6016
Referral Reasons: *
Primary
Arrears
Property Standards
Disruptive Behaviour
Secondary
Abuse/Violence
Health Issues
Family Issues
Legal Issues
Financial Issues
Hoarding
Rent ($): 200.00
Water ($): 500.00
Tenant Liability ($): 750.00
Other ($):
Referral Reason Comments:
Tenant has Mental Health issues which impact on his ability to sustain his tenancy. Tenant will not engage with any of the agencies supporting people with mental health issues and admits to not taking his medication. I have discussed STEP with the
Goals / Expected Outcomes
Seek Centrepay assistance and enter into a repayment arrangement. To seek medical assistance with his health issues to improve and maintain proerty standards.
Family Type: * Single Person under 55 with no childre
Other Household Members: Adults: Children (Under 16):
Previous History of Tenancy Support: Yes No
Advocates and Other Relevant Services Working With Household: Yes No
Tenancy Risk Assessment. Are there any worker safety concerns and/or key details? Yes No
If yes, please provide details (s):
Matrix Template: Public Housing
INITIAL MATRIX
Payments 3 TAKE ACTION
Going Away 5 ALL GOOD
Home 2 ACTION NEEDED URGENTLY
Yard 2 ACTION NEEDED URGENTLY
Tenant and Household 1 LAST CHANCE
Visitors 1 LAST CHANCE
Total Score: 14
Ready for Management Approval: Ready For Management Approval

Log – Comments

To add a Log, click on the 'Add New' button.



Select the Log Type from the drop-down option; complete the date and Log Comments.



The types of actions can be logged are:

Option	Description
Phone Call – Client	Phone call with the client.
Phone Call Missed - Client	Unsuccessful attempt to contact the client by phone
Phone Call - Other	Phone call to other parties
Meeting - Client	Meeting with the client
Meeting Missed – Client	Unsuccessful attempt to meet the client
Meeting - Client and Housing	Meeting with the client and the Housing Officer
Meeting Missed - Client and Housing	When the client did not attend a meeting with the Service Provider and the Housing Officer
Meeting - Client and Other	When the client attended a meeting with the Service Provider and other agency e.g. Centrelink

Meeting Missed - Client and Other	When the client did not attended a meeting with the Service Provider and other agency e.g. Centrelink
Meeting - Housing	Meeting between Service Provider and Housing that was not attended (not used for Six Weekly Meeting)
Meeting Missed - Housing	Meeting cancelled between Service Provider and Housing (not used for Six Weekly Meeting)
Letter – Client	When a letter is sent to the client
Letter – Housing	When a letter is sent to Housing
Meeting - Six Weekly Meeting	When the Six Weekly Meeting is scheduled/Outcome of the Six Weekly Meeting
General	All other actions.
Brokerage	When there is need to purchase goods/services to support the client in meeting their goals; provision of material assistance for the purchase of essential goods; removalists and storage and/or specialist services that are not offered by the agency or available from a free service e.g. counselling; family mediation; mental health and psychiatric services; occasional childcare etc.

To record a log, select a 'Log Type' and then record the date of the action in the 'Date' field (which can be backdated). Use the Log/Comments/Outcome:' to provide further details. Once you have completed your Log, save the record.

After a log comment is entered, save the record.

Log comments can be locked by clicking on the 'Lock' box. Once locked, the log ***cannot*** be updated further.

Note: Irrespective of when the log was entered, it will be sorted by the log date, not by the date it was entered into the system.

A log comment can be deleted within 24 hours of the log being recorded. This should only be used when it is entered onto an incorrect case.

The ‘History of Changes’ field allows you to view a history of each Log.

Hint: *A limited number of Logs can only be seen at a time – use the scroll bar on the right if you wish you view all the Logs.*

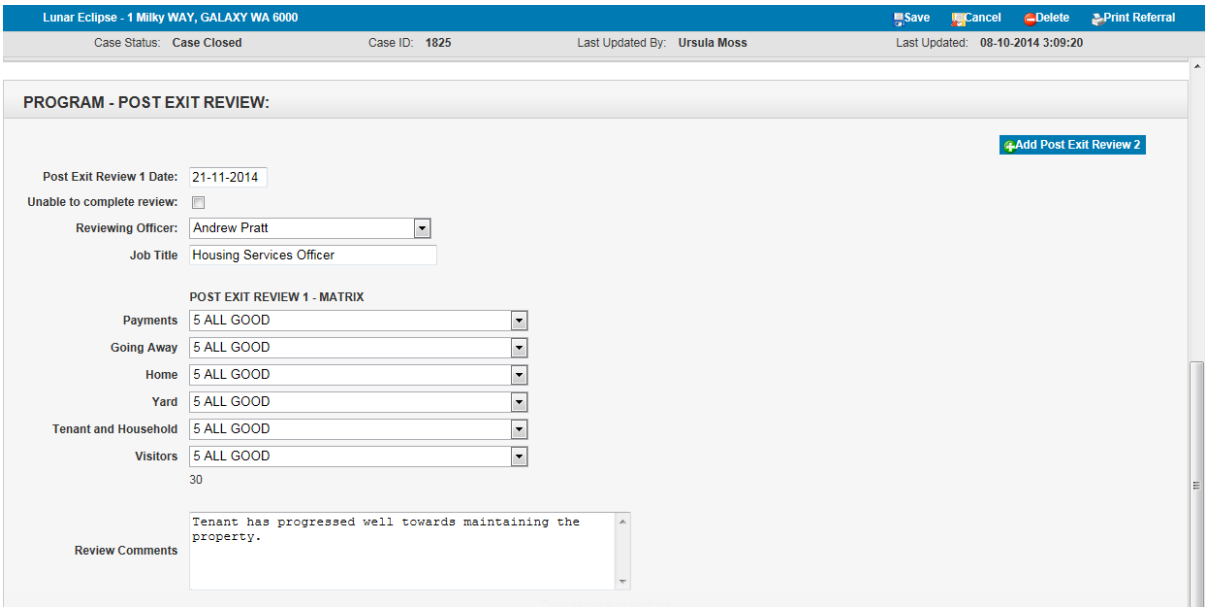
Program – Post Exit Review

A *Post Exit Review* must be completed by the *Housing Services Officer* and this can be completed at the *Tenant’s Annual Property Inspection* following their exit from STEP.

In order to complete the *Post Exit Review* the *Housing Services Officer* will need to:

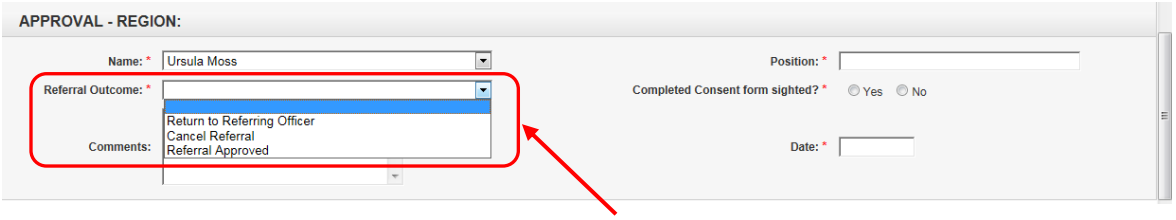
- *Conduct a Property Inspection* to record property standards
- *Talk to the Tenant* regarding their progress
- Record the tenant’s *Keeping My Home Matrix* scores.

To record the *Post Exit Review* click on Add Post Exit Review 1 which will display the screen below. If the *Post Exit Review* was unable to be completed tick the *Unable to complete review* box and write the reason in *Review Comments.*


Lunar Eclipse - 1 Milky WAY, GALAXY WA 6000
Save
Cancel
Delete
Print Referral
Case Status: Case Closed
Case ID: 1825
Last Updated By: Ursula Moss
Last Updated: 08-10-2014 3:09:20
PROGRAM - POST EXIT REVIEW:
Add Post Exit Review 2
Post Exit Review 1 Date: 21-11-2014
Unable to complete review:
Reviewing Officer: Andrew Pratt
Job Title Housing Services Officer
POST EXIT REVIEW 1 - MATRIX
Payments 5 ALL GOOD
Going Away 5 ALL GOOD
Home 5 ALL GOOD
Yard 5 ALL GOOD
Tenant and Household 5 ALL GOOD
Visitors 5 ALL GOOD
30
Review Comments
Tenant has progressed well towards maintaining the property.

Approval – Region

A team leader or a manager with *Housing Manager* access can return/cancel/approve the referral by selecting an option from the *Referral Outcome* drop-down list.



If the referral is returned or cancelled, an explanation will be provided in the Comments field.

Once approved, the referral is sent electronically to the Aboriginal Housing Services, Tenancy Support & Contract Management Business Unit.

Program – Post Exit Review

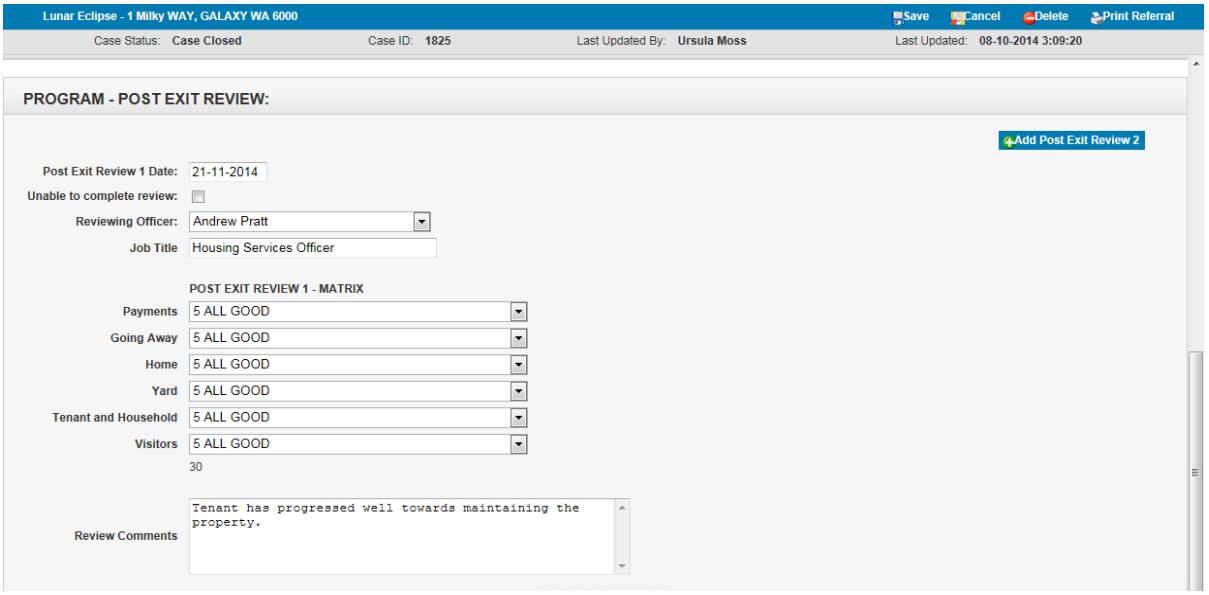
Post Exit Reviews must be completed by the *Housing Services Officer* and these should be completed 3 and 6 months following the Tenant's exit from STEP.

In order to complete the *Post Exit Review* the *Housing Services Officer* will need to:

- *Conduct a Property Inspection* to record property standards
- *Talk to the Tenant* regarding their progress
- Record the tenant's *Keeping My Home Matrix* scores.

To record the *Post Exit Review* click on

which will display the screen below. If the *Post Exit Review* was unable to be completed tick the *Unable to complete review* box and write the reason in *Review Comments.*

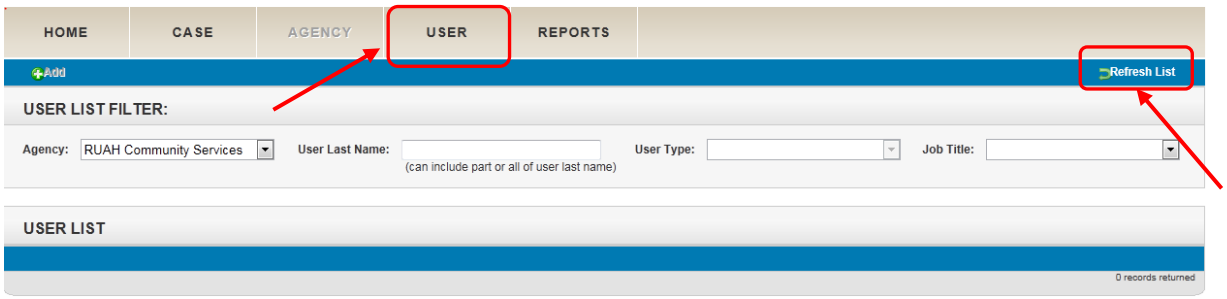

Lunar Eclipse - 1 Milky WAY, GALAXY WA 6000
Save
Cancel
Delete
Print Referral
Case Status: Case Closed
Case ID: 1825
Last Updated By: Ursula Moss
Last Updated: 08-10-2014 3:09:20
PROGRAM - POST EXIT REVIEW:
Add Post Exit Review 2
Post Exit Review 1 Date: 21-11-2014
Unable to complete review:
Reviewing Officer: Andrew Pratt
Job Title Housing Services Officer
POST EXIT REVIEW 1 - MATRIX
Payments 5 ALL GOOD
Going Away 5 ALL GOOD
Home 5 ALL GOOD
Yard 5 ALL GOOD
Tenant and Household 5 ALL GOOD
Visitors 5 ALL GOOD
30
Review Comments
Tenant has progressed well towards maintaining the property.

Similarly, record *Post Exit Review 2* at 6 months. If the *Post Exit Review* was unable to be completed tick the Unable to complet review box and write the reason in *Review Comments*.

USER - Menu Option

Regional Service Providers with Housing Manager and Support Providers with Agency Manager access will be able to update individual STEP User's access once the User has been set up in STEPIMS.

Click on the *User* icon and the User List Filter screen displays.

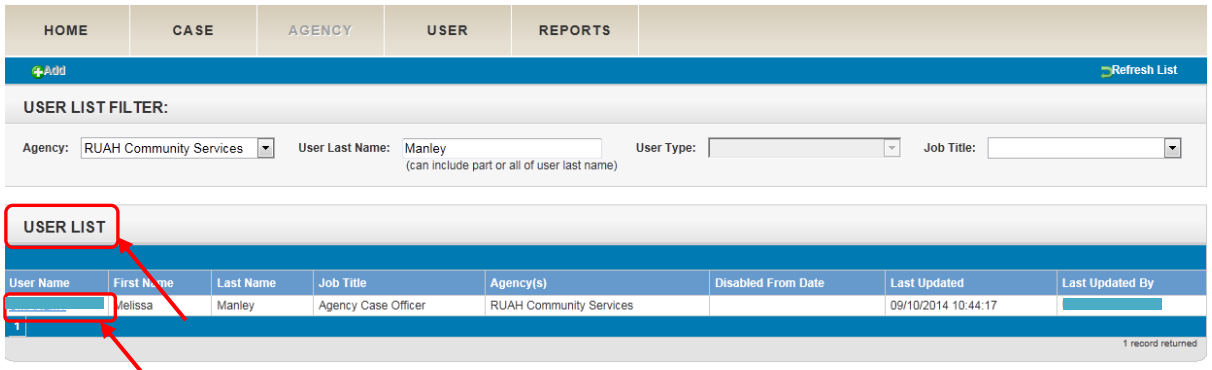


User List Filters

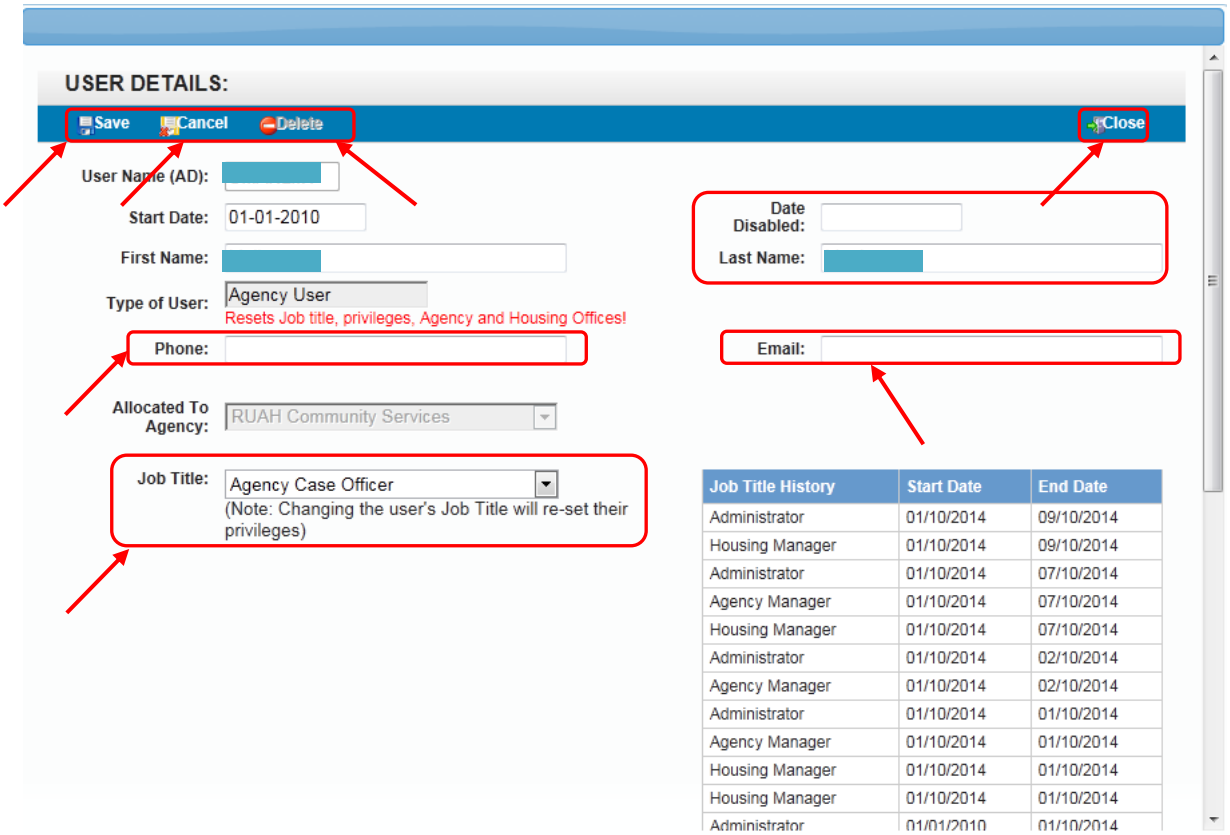
The *User List Filter* allows you to search for STEP Users using the provided search criteria e.g.

- User Last Name
- User Type (greyed out as used only by Administrators)
- Job Title

Click the *Refresh List* icon to find users that match the recorded criteria. The search results are then displayed in the *User List*.



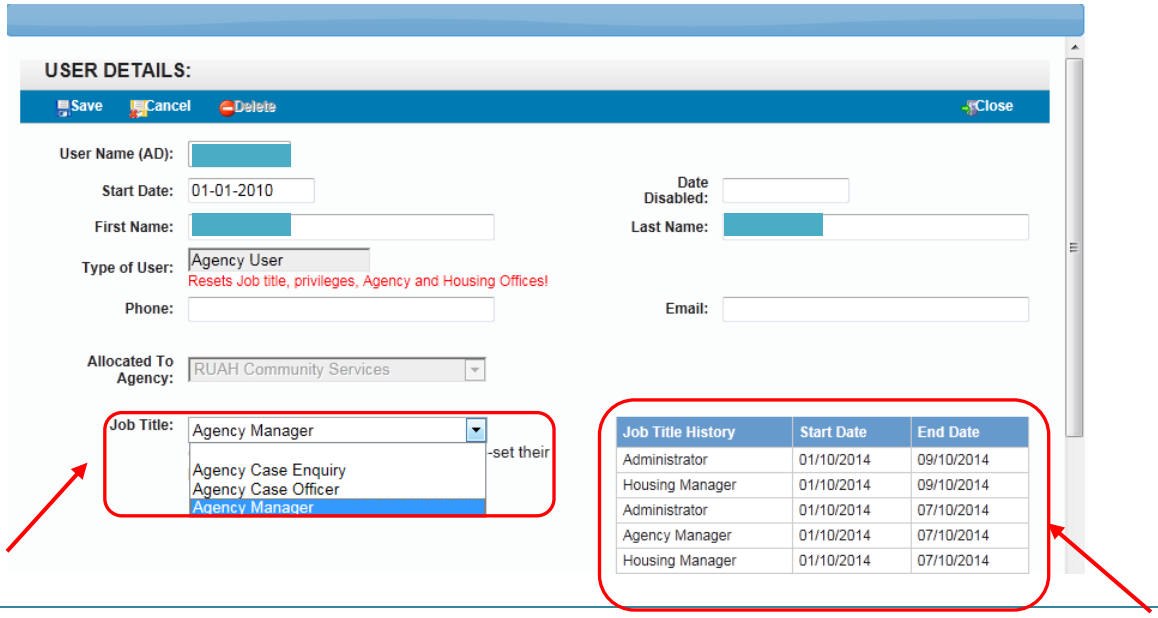
Click on the User Name to go into the User Details screen.



Housing Managers and Agency Managers can disable user accounts (e.g. if the staff member is on long term leave, or has left the agency). They can also update phone number and email details of workers.

Note: Unlike the case screen, the Save button is on the top left of the banner instead of the top right.

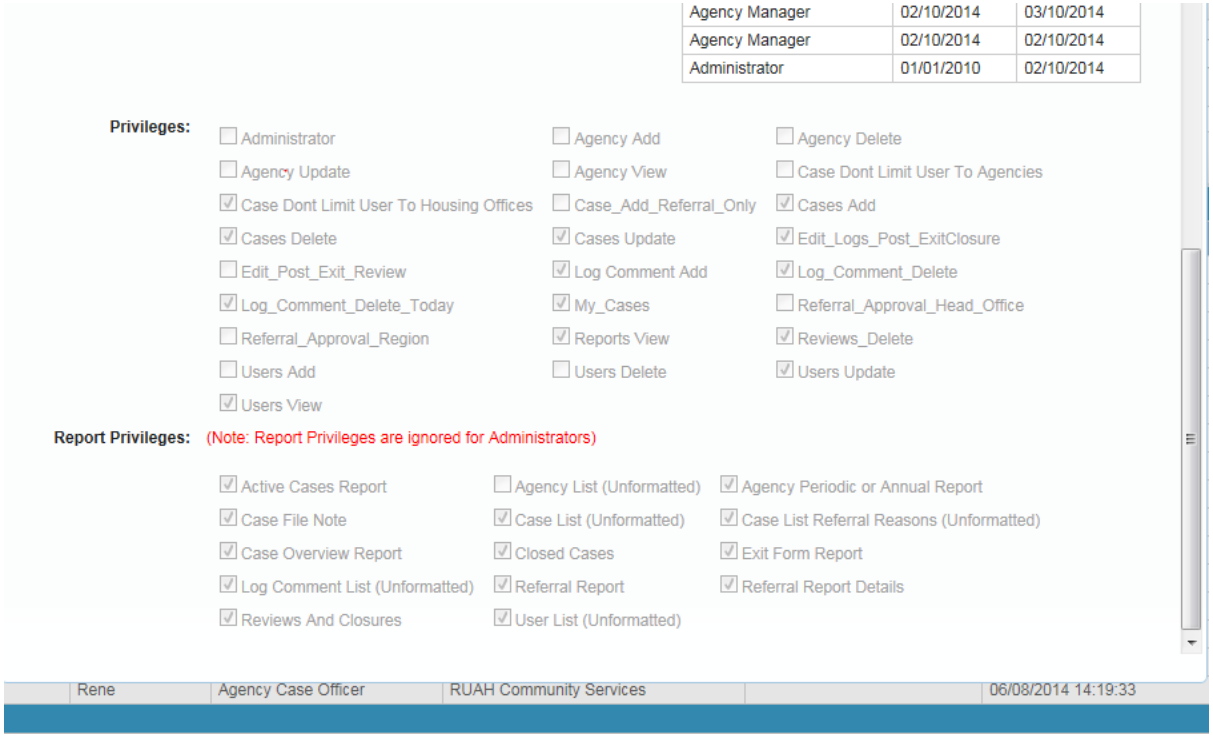
Housing Managers and Agency Managers can also change the user's Job Title by making a selection from the drop-down box. This will re-set their privileges within STEPIMS.



Job Title History

The Job Title History displays the history of the user and provides the duration of when they had particular access to STEPIMS.

The Privileges and Report Privileges have default settings for each Job Title. When the Job Title is changed so will the Privileges and Report Privileges



DEFAULT PRIVILEGES FOR STEPIMS USERS

Default privileges for STEPIMS Users

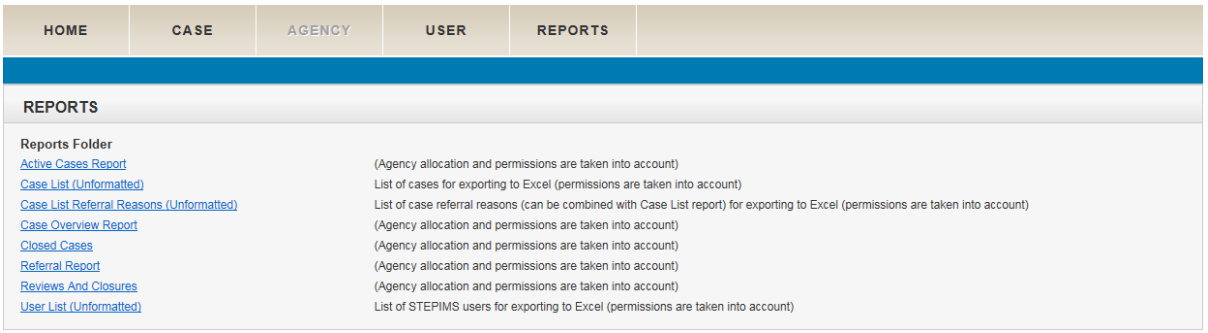
The table below show the default privileges for each user access.

Privilege Name	Housing Manager	Housing Officer	Housing Case Enquiry	Housing ICT	Agency Manager	Agency Case Officer	Agency Case Enquiry
Administrator							
Agency Add							
Agency Delete							
Agency Update							
Agency View				✓			
Case don't limit user to Agencies				✓			
Case don't limit user to Housing Offices				✓	✓	✓	✓
Case Add Referral Only	✓	✓					
Cases Add	✓	✓					
Cases Delete							
Cases Update	✓	✓			✓	✓	
Edit Logs Post Exit Closure					✓	✓	
Edit Post Exit Reviews	✓	✓					
Log Comment Add					✓	✓	
Log Comment Delete					✓		
Log Comment Delete today					✓	✓	
My cases	✓	✓			✓	✓	
Referral Approval Head Office							
Referral Approval Region	✓						
Reports view	✓				✓		
Reviews Delete					✓		
Users Add				✓			
Users Delete							
Users Update	✓			✓	✓		
Users View	✓			✓	✓		

REPORT - Menu Option

Managers and Team Leaders with Housing Manager access can view and print various reports for analysis.

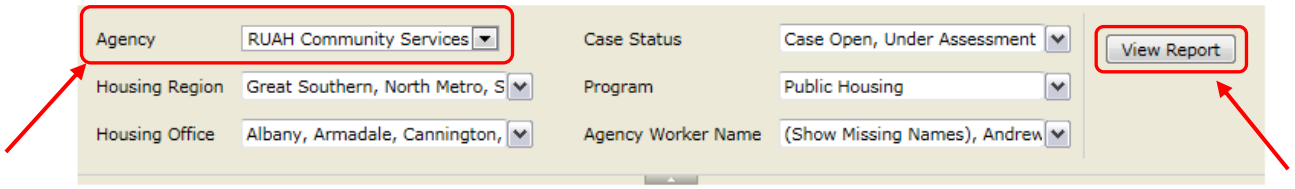
Click on the *Report* icon and the Reports screen displays.


HOME
CASE
AGENCY
USER
REPORTS
REPORTS
Reports Folder
Active Cases Report
(Agency allocation and permissions are taken into account)
Case List (Unformatted)
List of cases for exporting to Excel (permissions are taken into account)
Case List Referral Reasons (Unformatted)
List of case referral reasons (can be combined with Case List report) for exporting to Excel (permissions are taken into account)
Case Overview Report
(Agency allocation and permissions are taken into account)
Closed Cases
(Agency allocation and permissions are taken into account)
Referral Report
(Agency allocation and permissions are taken into account)
Reviews And Closures
(Agency allocation and permissions are taken into account)
User List (Unformatted)
List of STEPIMS users for exporting to Excel (permissions are taken into account)

To run a report click on the link on the left side of the screen. In the Agency field select your Agency.

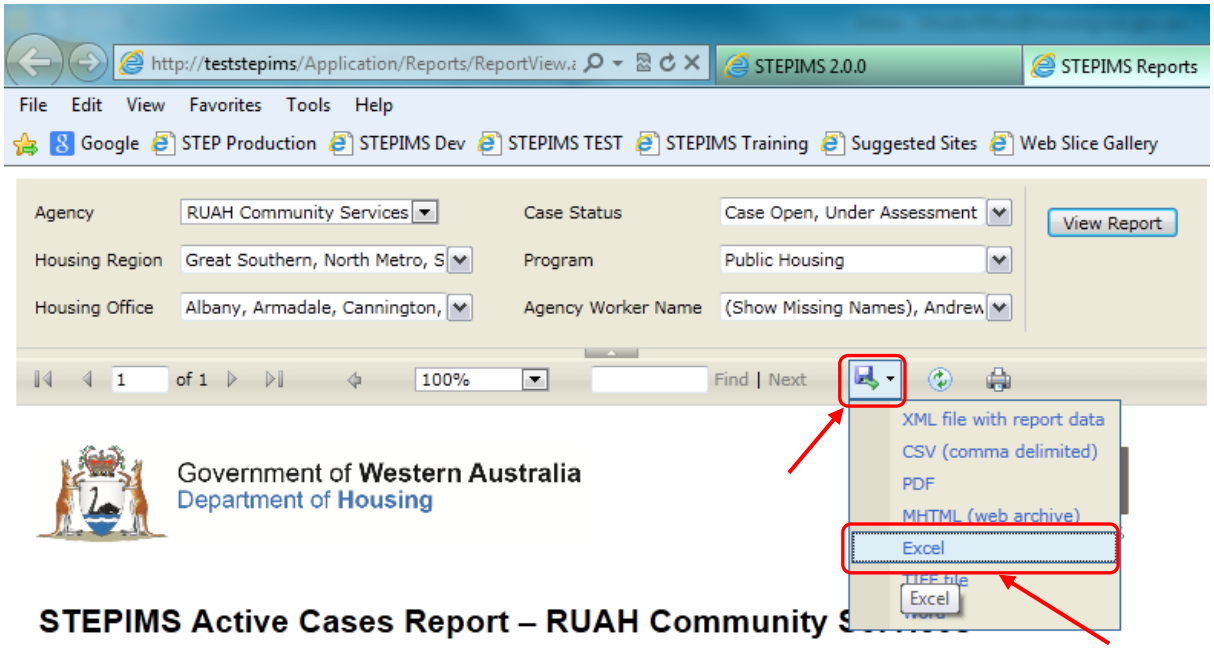
Note: *The other fields automatically revert to their default settings.*

You can select from the drop-down options to tailor the report.



To view the report, click on the View Report button. The report displays.

To view the report in Excel, click on the icon and then select Excel.



Government of **Western Australia**
Department of **Housing**

STEPIMS Active Cases Report – RUAH Community S

Printed by Ursula Moss on 09/10/2014

Case Status: Case Open, Under Assessment

Agency Worker Name: [redacted]

Program: Public Housing

Housing Region: Great Southern, North Metro, South East Metro, South Metro

Housing Office: Albany, Armadale, Cannington, Fremantle, Joondalup, Katanning, Kwinana, Mandurah, Midland, Mirrabooka, Victoria Park, Wellington Street

Agency Worker:	Open Cases	Under Assessment	Total
[redacted]	2	2	4
[redacted]	6	3	9
	0	28	28
[redacted]	0	6	6
[redacted]	9	5	14

The following table provides a description for each report that can be produced.

Report Title	Report Description
Active Cases Report	A detailed summary of *Open Cases* and cases *Under Assessment*.
Case List (Unformatted)	A spreadsheet containing raw data of each case on STEPIMS.
Case List Referral Reasons (Unformatted)	A spreadsheet containing the referral reasons for each case.
Case Overview Report	A snapshot of the current status of all cases in a financial year.
Closed Cases	An overview of the outcome of the cases closed or terminated early within a date range.
Referral Report	Details of all cases currently in Proposed Referral, Referral, Waitlist for Assessment or Waitlist status.
Reviews and Closures	Cases where the Next Review Date or Expected End Date is within the date range entered. Please note, this report does not indicate if a review has been completed or is overdue.
User List (Unformatted)	List of STEPIMS users associated with the agency/housing office.

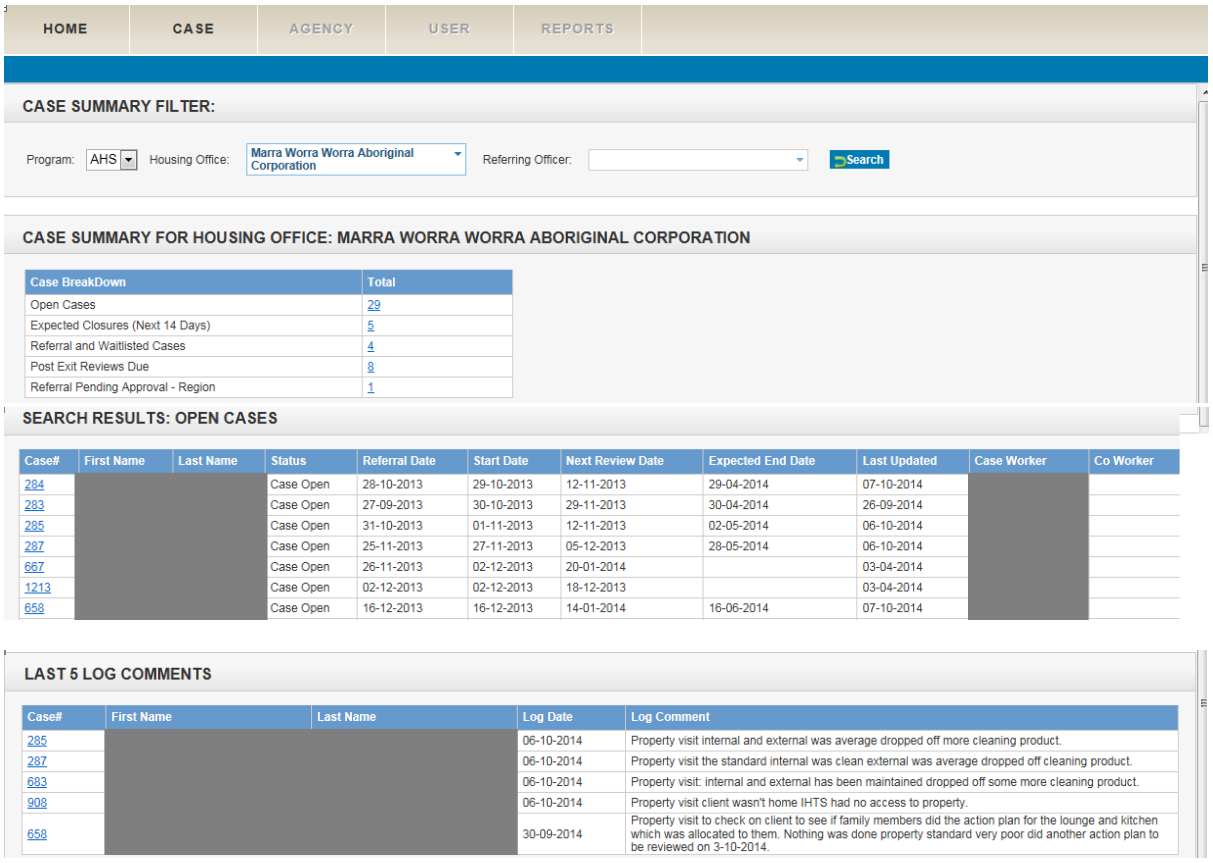
HOUSING OFFICER ACCESS

Users with *Housing Officer* access can search, add, and edit client records.

HOME – Menu Option

For users with *Housing Officer* access the *Home* page displays the following:

Home Page


HOME
CASE
AGENCY
USER
REPORTS
CASE SUMMARY FILTER:
Program: AHS
Housing Office: Marra Worra Worra Aboriginal Corporation
Referring Officer:
Search
CASE SUMMARY FOR HOUSING OFFICE: MARRA WORRA WORRA ABORIGINAL CORPORATION
Case BreakDown | Total
Open Cases | 29
Expected Closures (Next 14 Days) | 5
Referral and Waitlisted Cases | 4
Post Exit Reviews Due | 8
Referral Pending Approval - Region | 1
SEARCH RESULTS: OPEN CASES
Case# | First Name | Last Name | Status | Referral Date | Start Date | Next Review Date | Expected End Date | Last Updated | Case Worker | Co Worker
284 | Case Open | 28-10-2013 | 29-10-2013 | 12-11-2013 | 29-04-2014 | 07-10-2014
283 | Case Open | 27-09-2013 | 30-10-2013 | 29-11-2013 | 30-04-2014 | 26-09-2014
285 | Case Open | 31-10-2013 | 01-11-2013 | 12-11-2013 | 02-05-2014 | 06-10-2014
287 | Case Open | 25-11-2013 | 27-11-2013 | 05-12-2013 | 28-05-2014 | 06-10-2014
667 | Case Open | 26-11-2013 | 02-12-2013 | 20-01-2014 | | 03-04-2014
1213 | Case Open | 02-12-2013 | 02-12-2013 | 18-12-2013 | | 03-04-2014
658 | Case Open | 16-12-2013 | 16-12-2013 | 14-01-2014 | 16-06-2014 | 07-10-2014
LAST 5 LOG COMMENTS
Case# | First Name | Last Name | Log Date | Log Comment
285 | 06-10-2014 | Property visit internal and external was average dropped off more cleaning product.
287 | 06-10-2014 | Property visit the standard internal was clean external was average dropped off cleaning product.
683 | 06-10-2014 | Property visit: internal and external has been maintained dropped off some more cleaning product.
908 | 06-10-2014 | Property visit client wasn't home IHTS had no access to property.
658 | 30-09-2014 | Property visit to check on client to see if family members did the action plan for the lounge and kitchen which was allocated to them. Nothing was done property standard very poor did another action plan to be reviewed on 3-10-2014.

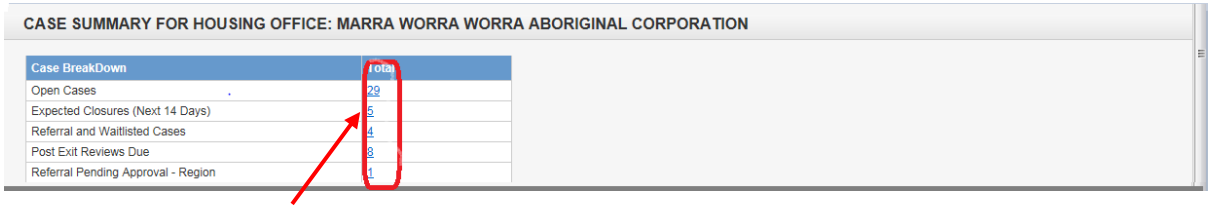
Case Summary Filter:

The *Case Summary Filter* allows the Housing Officer to view cases from a list of Housing Offices where applicable.

Case Summary for Housing Office:

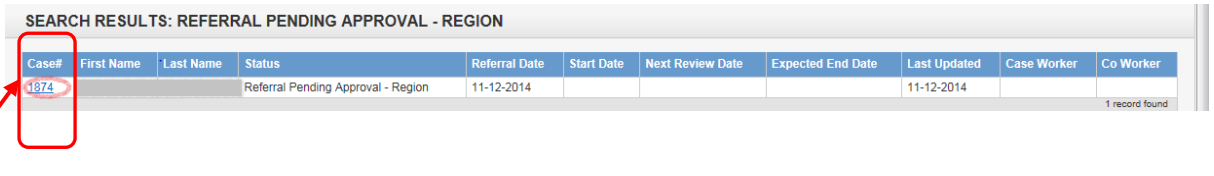
The *Case Summary for Housing Office* section displays the No. of Cases. To view these cases click on the number in the *Total* column

Case Summary for Housing Office


CASE SUMMARY FOR HOUSING OFFICE: MARRA WORRA WORRA ABORIGINAL CORPORATION
Case BreakDown | Total
Open Cases | 29
Expected Closures (Next 14 Days) | 5
Referral and Waitlisted Cases | 4
Post Exit Reviews Due | 8
Referral Pending Approval - Region | 1

Search Results

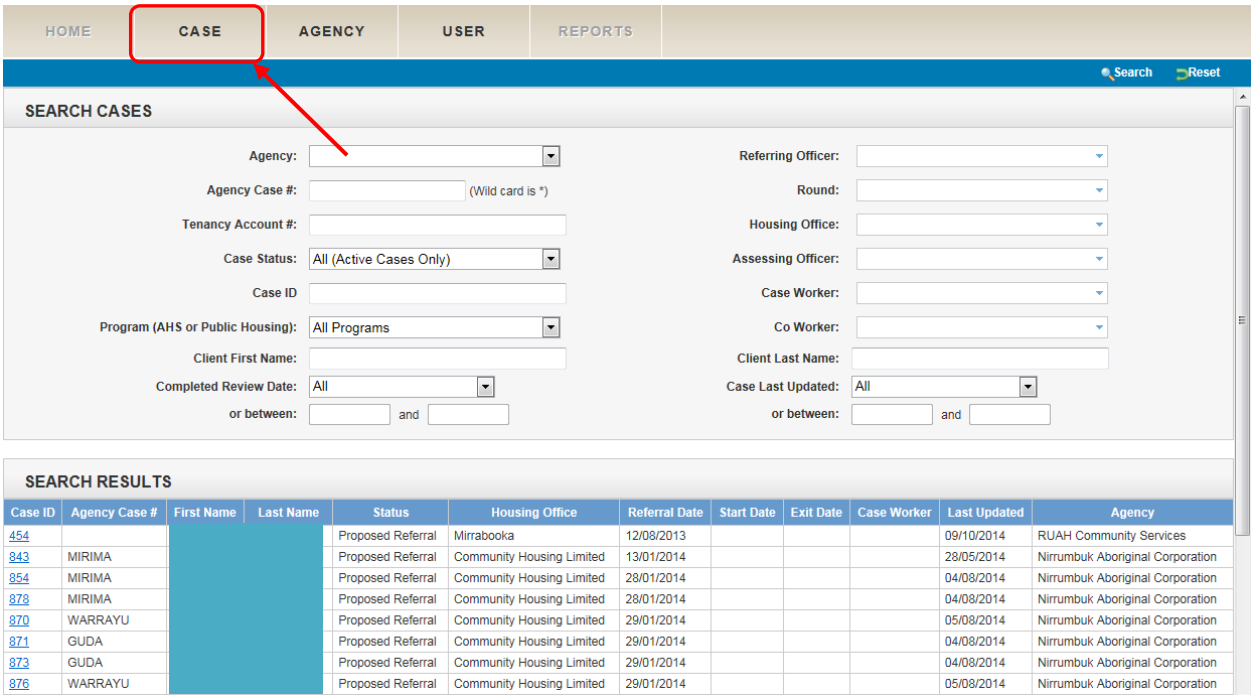
The *Search Results* section displays details of the cases. To open a case, click on the *Case #*



Last 5 Log Comments

The Last 5 Log Comments made to cases are displayed in this area.

CASE – Menu Option


HOME
CASE
AGENCY
USER
REPORTS
Search
Reset
SEARCH CASES
Agency:
Agency Case #:
(Wild card is *)
Tenancy Account #:
Case Status:
All (Active Cases Only)
Case ID
Program (AHS or Public Housing):
All Programs
Client First Name:
Completed Review Date:
All
or between:
and
Referring Officer:
Round:
Housing Office:
Assessing Officer:
Case Worker:
Co Worker:
Client Last Name:
Case Last Updated:
All
or between:
and
SEARCH RESULTS
Case ID | Agency Case # | First Name | Last Name | Status | Housing Office | Referral Date | Start Date | Exit Date | Case Worker | Last Updated | Agency
454 | | | | Proposed Referral | Mirrabooka | 12/08/2013 | | | | 09/10/2014 | RUAH Community Services
843 | MIRIMA | | | Proposed Referral | Community Housing Limited | 13/01/2014 | | | | 28/05/2014 | Nirrumbuk Aboriginal Corporation
854 | MIRIMA | | | Proposed Referral | Community Housing Limited | 28/01/2014 | | | | 04/08/2014 | Nirrumbuk Aboriginal Corporation
878 | MIRIMA | | | Proposed Referral | Community Housing Limited | 28/01/2014 | | | | 04/08/2014 | Nirrumbuk Aboriginal Corporation
870 | WARRAYU | | | Proposed Referral | Community Housing Limited | 29/01/2014 | | | | 05/08/2014 | Nirrumbuk Aboriginal Corporation
871 | GUDA | | | Proposed Referral | Community Housing Limited | 29/01/2014 | | | | 04/08/2014 | Nirrumbuk Aboriginal Corporation
873 | GUDA | | | Proposed Referral | Community Housing Limited | 29/01/2014 | | | | 04/08/2014 | Nirrumbuk Aboriginal Corporation
876 | WARRAYU | | | Proposed Referral | Community Housing Limited | 29/01/2014 | | | | 05/08/2014 | Nirrumbuk Aboriginal Corporation

Case – Search

This option allows you to search for cases. You can go directly from the *Search Results* area into the client details screen.

To search, you can enter details in a number of fields and make selections from the drop-down options.

Search criteria may be entered in the following fields:

- *Agency Case #*
- *Tenancy Account #*
- *Case ID*
- *Client First Name*
- *Client Last Name*

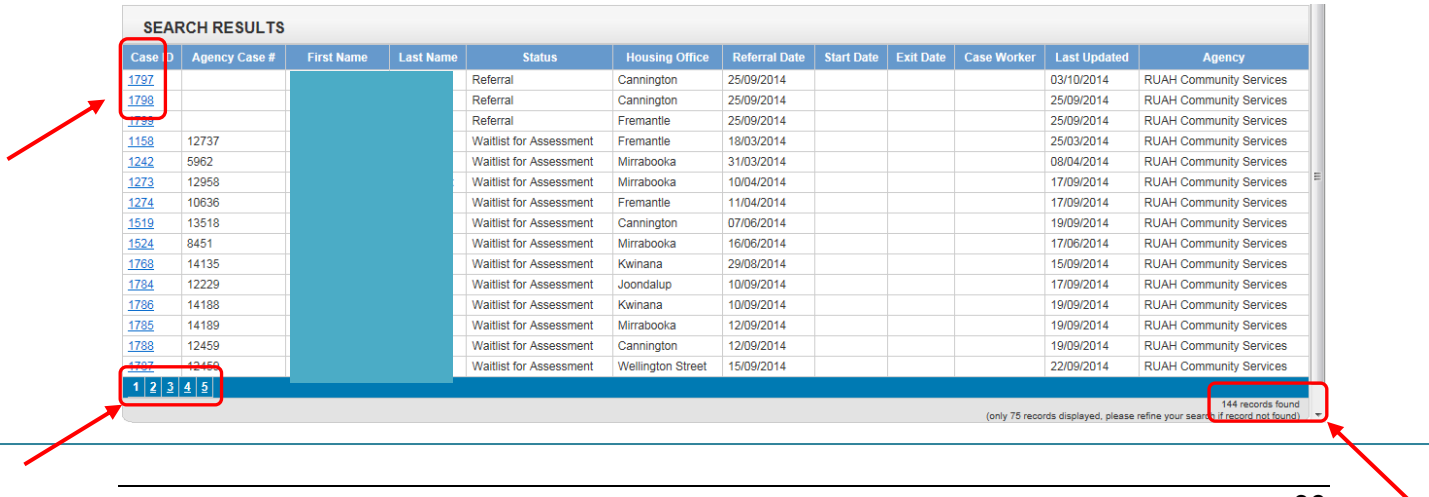
Search criteria may be selected from the following drop-down options:

- *Agency*: this field automatically defaults to your agency
- *Case Status*:
  - *All (Active Case Only)*
  - *All (Include Closed/Withdrawn Cases)*
  - *Referral*
  - *Ended at Referral Stage*
  - *Waitlist for Assessment*

- *Under Assessment*
- *Ended at Assessment Stage*
- *Waitlisted*
- *Case Open*
- *Case Terminated Early*
- *Case Closed*

- *Program (AHS or Public Housing)*
  - *All Programs*
  - *Public Housing*
  - *Aboriginal Housing Services*
- *Complete Review Date:*
  - *All*
  - *In Last 10 Days*
  - *In Last 30 Days*
  - *Custom* - select a date range
- *Referring Officer* – Choose from List of Names of Housing Officers or the option to check all officers is available
- *Round* – Choose from a list of Housing Office Round Numbers (A Round is a group of houses covered by a Housing Services Officer)
- *Housing Office* – Choose from a List of Housing Offices or the option to check all offices is available
- *Assessing Officer* - Choose from List of Assessing Officers or the option to check all officers is available
- *Case Worker* - Choose from List of Case Workers or the option to check all officers is available
- *Co Worker* – Choose from List of Co Workers or the option to check all officers is available
- *Case Last Updated*
  - *All*
  - *In Last 10 Days*
  - *In Last 30 Days*
  - *Custom* - select a date range

A search may be narrowed by completing as much of the Search Criteria as possible. The results are displayed in the *Search Results* section and are listed in *Status* order (i.e. Referral; Waitlist for Assessment etc).



SEARCH RESULTS

Case ID	Agency Case #	First Name	Last Name	Status	Housing Office	Referral Date	Start Date	Exit Date	Case Worker	Last Updated	Agency
1797				Referral	Cannington	25/09/2014				03/10/2014	RUAH Community Services
1798				Referral	Cannington	25/09/2014				25/09/2014	RUAH Community Services
1799				Referral	Fremantle	25/09/2014				25/09/2014	RUAH Community Services
1158	12737			Waitlist for Assessment	Fremantle	18/03/2014				25/03/2014	RUAH Community Services
1242	5962			Waitlist for Assessment	Mirrabooka	31/03/2014				08/04/2014	RUAH Community Services
1273	12958			Waitlist for Assessment	Mirrabooka	10/04/2014				17/09/2014	RUAH Community Services
1274	10636			Waitlist for Assessment	Fremantle	11/04/2014				17/09/2014	RUAH Community Services
1519	13518			Waitlist for Assessment	Cannington	07/06/2014				19/09/2014	RUAH Community Services
1524	8451			Waitlist for Assessment	Mirrabooka	16/06/2014				17/06/2014	RUAH Community Services
1768	14135			Waitlist for Assessment	Kwinana	29/08/2014				15/09/2014	RUAH Community Services
1784	12229			Waitlist for Assessment	Joondalup	10/09/2014				17/09/2014	RUAH Community Services
1786	14188			Waitlist for Assessment	Kwinana	10/09/2014				19/09/2014	RUAH Community Services
1785	14189			Waitlist for Assessment	Mirrabooka	12/09/2014				19/09/2014	RUAH Community Services
1788	12459			Waitlist for Assessment	Cannington	12/09/2014				19/09/2014	RUAH Community Services
1787	13459			Waitlist for Assessment	Wellington Street	15/09/2014				22/09/2014	RUAH Community Services

1 2 3 4 5

144 records found
(only 75 records displayed, please refine your search if record not found)

To view a particular case, click on the *Case ID* No. to go to the details screen for that client.

Information on the *Case Details* screen is covered in a later section of this guide.

The number(s) in the bottom left corner of the screen (in the blue banner) indicates the number of pages found; 15 records per page are displayed at a time. The number in the bottom right corner of the screen (in the grey banner) shows the total number of cases that met the search criteria.

Hint: The *Reset* button removes any existing search criteria so you can start again.

Note: By default, inactive cases (clients who have exited the program and referrals that were withdrawn/not accepted) do not display in the *Search Results* unless the "*All (Include Closed/Withdrawn Cases)"* is selected from the *Case Status* drop-down option.

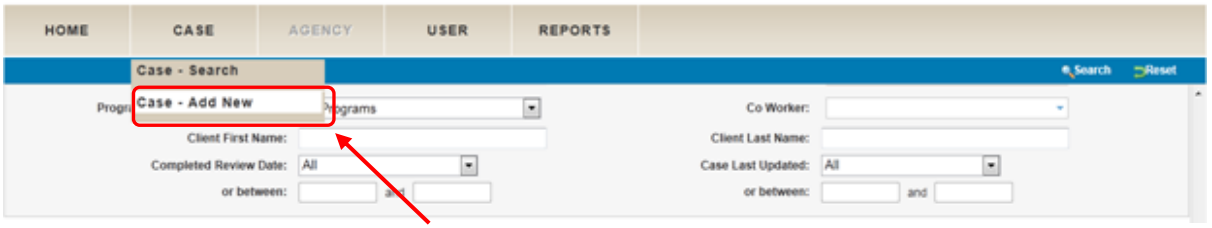
CASE – Add New

All referrals to STEP are now entered directly onto STEPIMS by Housing staff only.

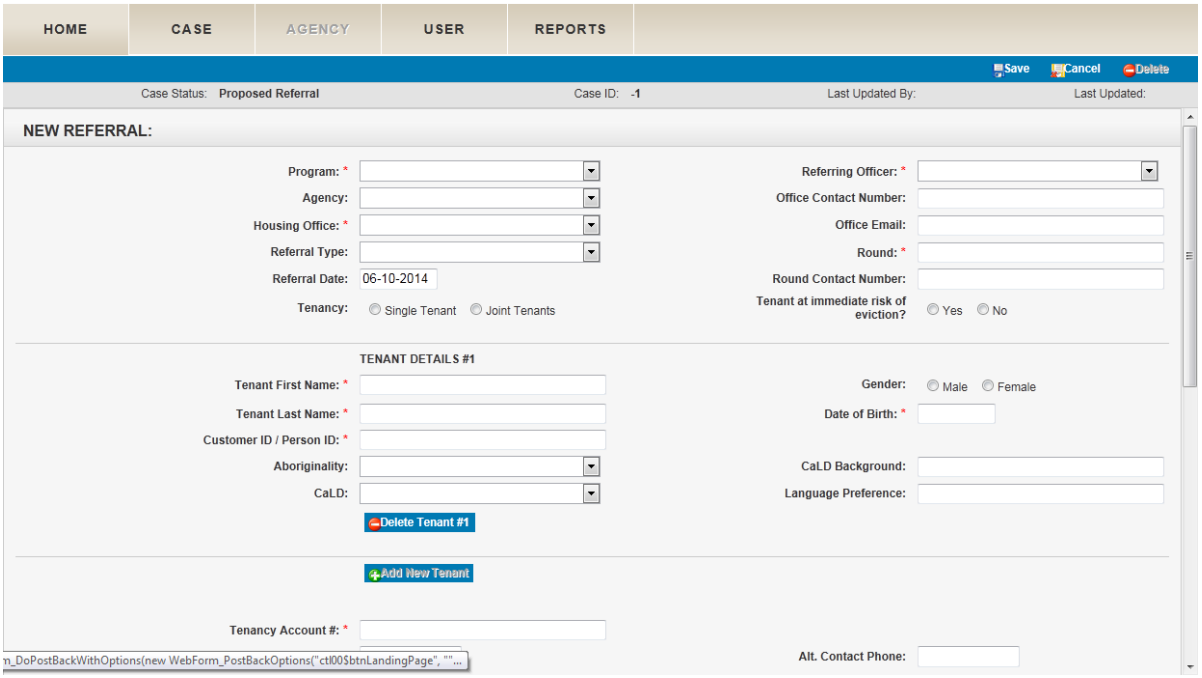
Paper referrals will no longer be processed.

After you have logged in to the **STEPIMS Production (live)** database and the *Home* page displays click on ***Case*** and then ***Case – Add New*** as shown below.

The *Case – Add New* menu option allows you to create a referral in STEPIMS. Click on the *Case – Add New* link.



The New Referral screen displays.



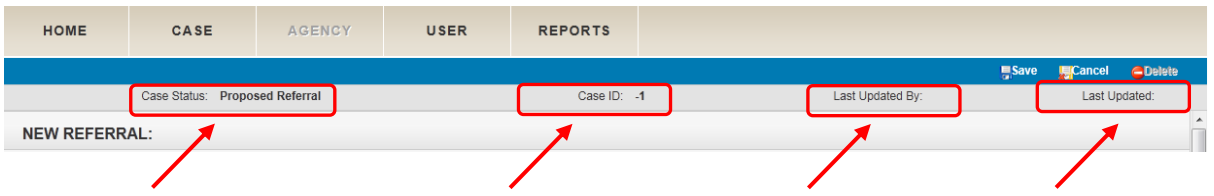
Menu Bar

The area in the top blue banner will look like this:

There are buttons in the top right:

Button	Function
Save	Click the Save button to save your work. A message in green font will display for a few seconds at the bottom of the screen if the save was successful: *Case was successfully saved.*
Cancel	Click the Cancel button to reset the data fields to how they were when the case was last saved. You will get a pop up box asking you to confirm you wish to cancel the changes you have made. If you proceed, a message in green font will display for a few seconds at the bottom of your screen if the save was successful: *Case changes cancelled and screen refreshed successfully!*
Delete	This function is only available to Agency Managers. If you have entered a case into the system by accident (e.g. put in the same referral twice), ask an officer with Agency Manager access (or email the STEPIMS Administrator at step@housing.wa.gov.au) to delete the case in question.

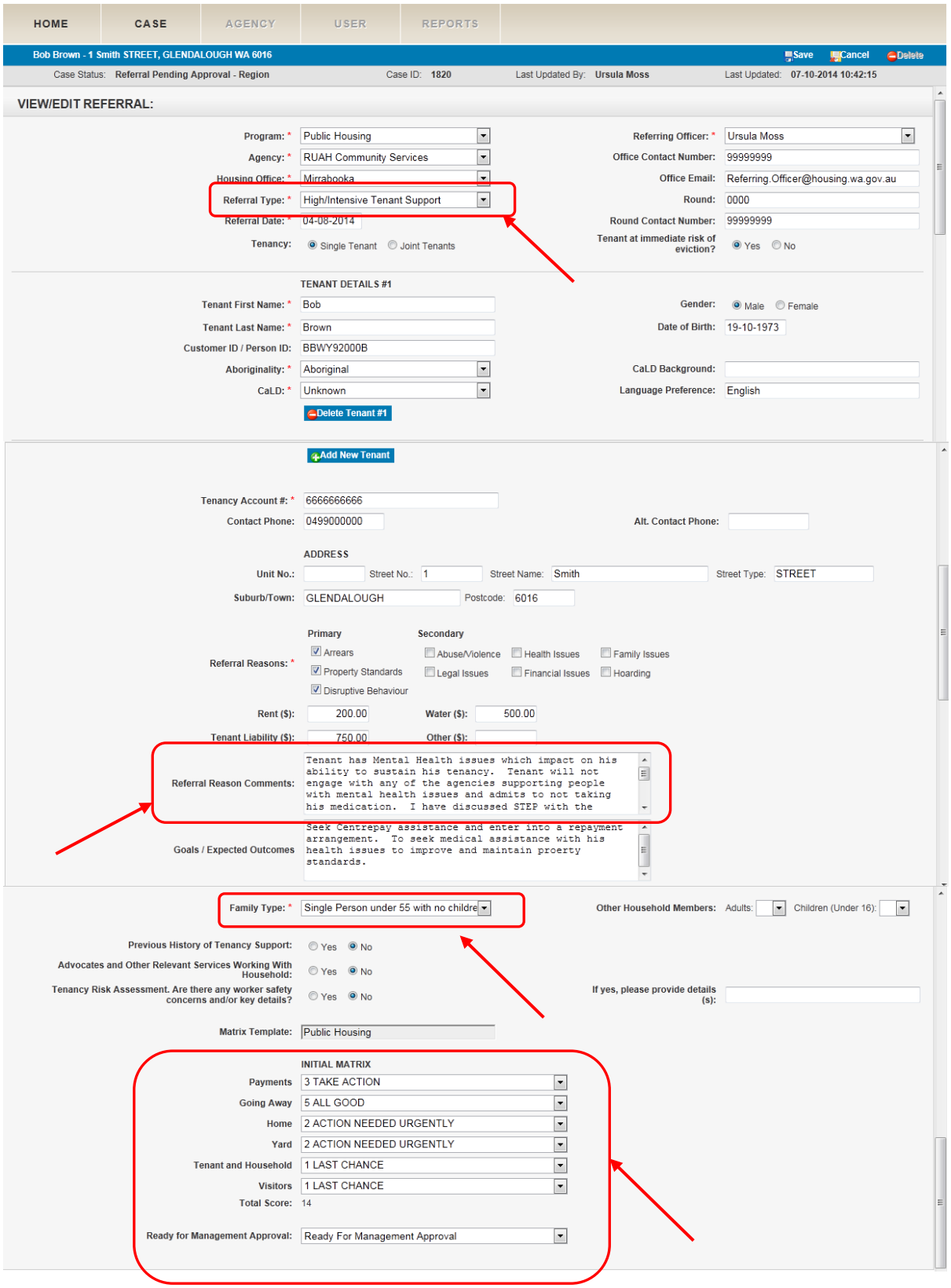
The grey banner contains four fields:



Field	Details
Case Status	This field shows the status of the case and will update as you save a record.
Case ID	This is a unique number allocated to each case. The ID will be -1 until a case is successfully saved.
Last Updated By	This displays the name of the user who last updated the record.
Last Updated	This displays the date and time the record was last saved.

New Referral

When a tenant has been identified as a suitable STEP client, the Referring Officer will complete the *Referral* section. *You will select Aboriginal Housing (not Public Hsg in the Program drop down menu).*


HOME
CASE
AGENCY
USER
REPORTS
Bob Brown - 1 Smith STREET, GLENDALOUGH WA 6016
Save
Cancel
Delete
Case Status: Referral Pending Approval - Region
Case ID: 1820
Last Updated By: Ursula Moss
Last Updated: 07-10-2014 10:42:15
VIEW/EDIT REFERRAL:
Program: * Public Housing
Agency: * RUAH Community Services
Housing Office: * Mirrabooka
Referral Type: * High/Intensive Tenant Support
Referral Date: * 04-08-2014
Tenancy: Single Tenant Joint Tenants
Referring Officer: * Ursula Moss
Office Contact Number: 99999999
Office Email: Referring.Officer@housing.wa.gov.au
Round: 0000
Round Contact Number: 99999999
Tenant at immediate risk of eviction? Yes No
TENANT DETAILS #1
Tenant First Name: * Bob
Tenant Last Name: * Brown
Customer ID / Person ID: BBWY92000B
Aboriginality: * Aboriginal
CaLD: * Unknown
Gender: Male Female
Date of Birth: 19-10-1973
CaLD Background:
Language Preference: English
Delete Tenant #1
Add New Tenant
Tenancy Account #: * 6666666666
Contact Phone: 0499000000
Alt. Contact Phone:
ADDRESS
Unit No.:
Street No.: 1
Street Name: Smith
Street Type: STREET
Suburb/Town: GLENDALOUGH
Postcode: 6016
Referral Reasons: *
Primary
Arrears
Property Standards
Disruptive Behaviour
Secondary
Abuse/Violence
Health Issues
Family Issues
Legal Issues
Financial Issues
Hoarding
Rent ($): 200.00
Water ($): 500.00
Tenant Liability ($): 750.00
Other ($):
Referral Reason Comments:
Tenant has Mental Health issues which impact on his ability to sustain his tenancy. Tenant will not engage with any of the agencies supporting people with mental health issues and admits to not taking his medication. I have discussed STEP with the
Goals / Expected Outcomes
Seek Centrepay assistance and enter into a repayment arrangement. To seek medical assistance with his health issues to improve and maintain proerty standards.
Family Type: * Single Person under 55 with no childre
Other Household Members: Adults: Children (Under 16):
Previous History of Tenancy Support: Yes No
Advocates and Other Relevant Services Working With Household: Yes No
Tenancy Risk Assessment. Are there any worker safety concerns and/or key details? Yes No
If yes, please provide details (s):
Matrix Template: Public Housing
INITIAL MATRIX
Payments 3 TAKE ACTION
Going Away 5 ALL GOOD
Home 2 ACTION NEEDED URGENTLY
Yard 2 ACTION NEEDED URGENTLY
Tenant and Household 1 LAST CHANCE
Visitors 1 LAST CHANCE
Total Score: 14
Ready for Management Approval: Ready For Management Approval

Referral Types

The *Referral Types* are:

- *New Living Skills*
- *Housing Applicant*
- *Education/Early Intervention*
- *Tenant Support*
- *High/Intensive Tenant Support*

The *Referral Reasons* area will display a number of *Primary* and *Secondary* tick boxes based on the selected *Referral Type*. At least one of the *Primary* boxes must be ticked. For example a '*Tenant Support'* or '*High/Intensive Tenant Support'* referral will display the following Primary boxes:

- *Arrears*
- *Property Standards*
- *Disruptive Behaviour*

Note: Once the Referral Reason(s) have been entered you are able to save the record. An error message will pop up if any details are missing or have not been completed.

The *Referral Reason Comments* text box is used to provide further details about the referral i.e. 'Tony has been issued with one strike for disruptive behaviour caused by extended family making a noise late at night and hassling the neighbours and visitors to nearby units.

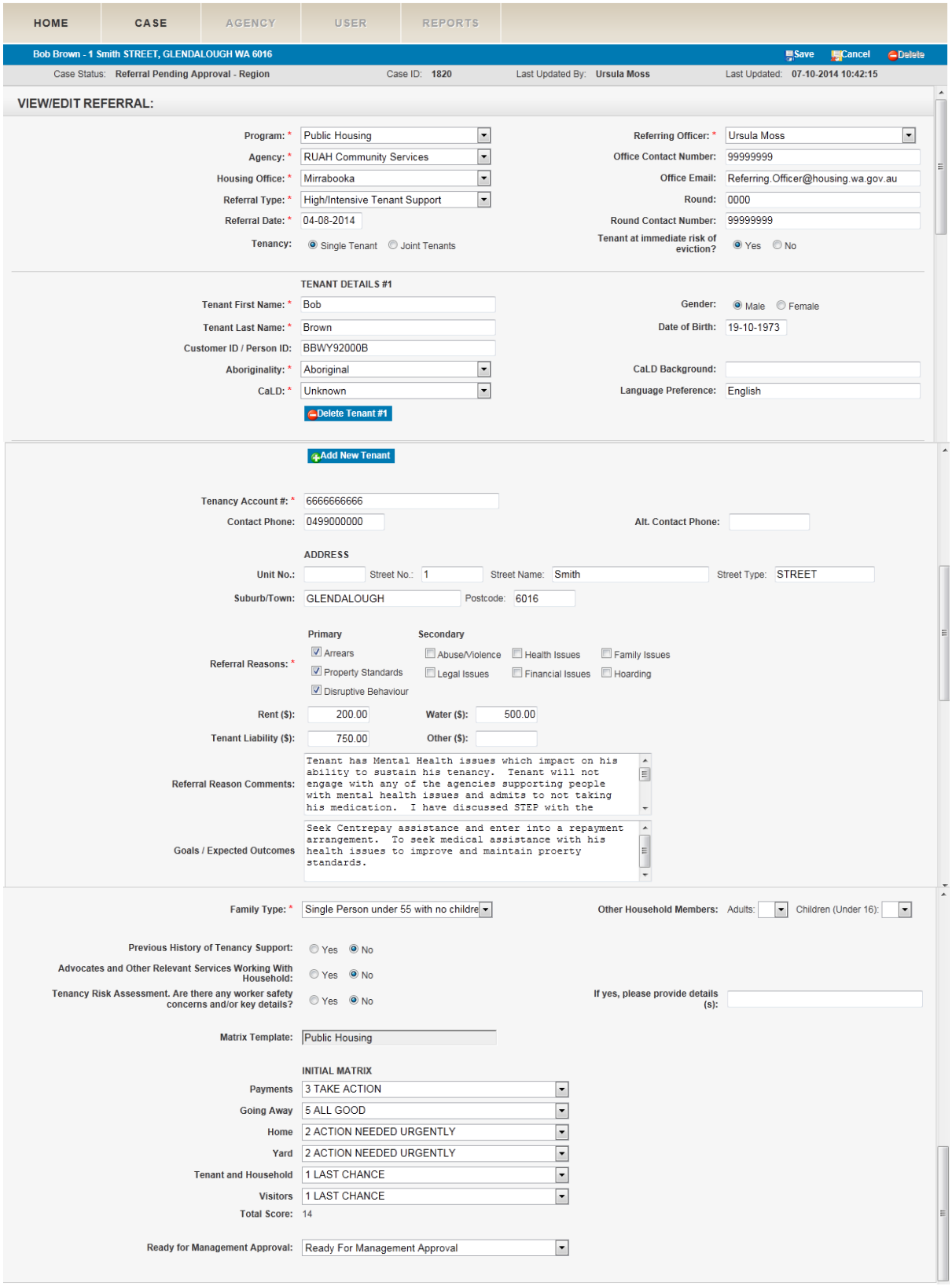
When all the information has been entered, the form needs to be approved.

Select the *Ready for Management Approval* box and save the record (see below).

A Case ID No. is automatically generated and the referral is electronically passed to the Regional Team Leader/Manager for approval.

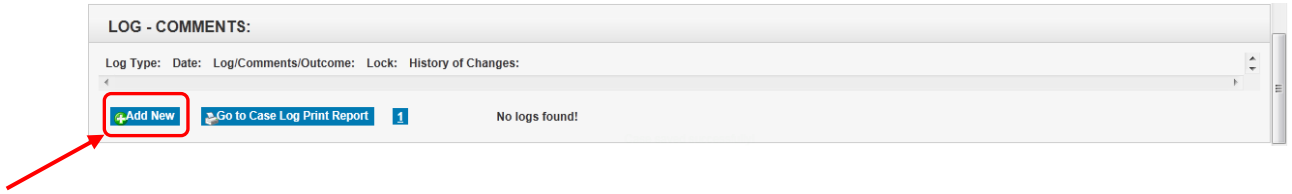
Example of a Completed Referral

You will have selected Aboriginal Housing (and not Public Housing) in the first Program drop down menu.

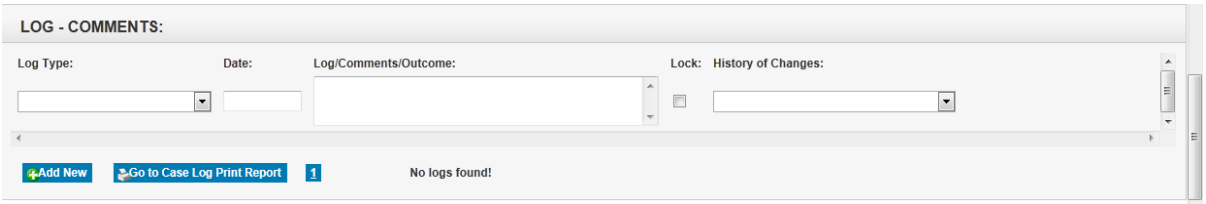

HOME
CASE
AGENCY
USER
REPORTS
Bob Brown - 1 Smith STREET, GLENDALOUGH WA 6016
Save
Cancel
Delete
Case Status: Referral Pending Approval - Region
Case ID: 1820
Last Updated By: Ursula Moss
Last Updated: 07-10-2014 10:42:15
VIEW/EDIT REFERRAL:
Program: * Public Housing
Agency: * RUAH Community Services
Housing Office: * Mirrabooka
Referral Type: * High/Intensive Tenant Support
Referral Date: * 04-08-2014
Tenancy: Single Tenant Joint Tenants
Referring Officer: * Ursula Moss
Office Contact Number: 99999999
Office Email: Referring.Officer@housing.wa.gov.au
Round: 0000
Round Contact Number: 99999999
Tenant at immediate risk of eviction? Yes No
TENANT DETAILS #1
Tenant First Name: * Bob
Tenant Last Name: * Brown
Customer ID / Person ID: BBWY92000B
Aboriginality: * Aboriginal
CaLD: * Unknown
Gender: Male Female
Date of Birth: 19-10-1973
CaLD Background:
Language Preference: English
Delete Tenant #1
Add New Tenant
Tenancy Account #: * 6666666666
Contact Phone: 0499000000
Alt. Contact Phone:
ADDRESS
Unit No.:
Street No.: 1
Street Name: Smith
Street Type: STREET
Suburb/Town: GLENDALOUGH
Postcode: 6016
Referral Reasons: *
Primary
Arrears
Property Standards
Disruptive Behaviour
Secondary
Abuse/Violence
Health Issues
Family Issues
Legal Issues
Financial Issues
Hoarding
Rent ($): 200.00
Water ($): 500.00
Tenant Liability ($): 750.00
Other ($):
Referral Reason Comments:
Tenant has Mental Health issues which impact on his ability to sustain his tenancy. Tenant will not engage with any of the agencies supporting people with mental health issues and admits to not taking his medication. I have discussed STEP with the
Goals / Expected Outcomes
Seek Centrepay assistance and enter into a repayment arrangement. To seek medical assistance with his health issues to improve and maintain proerty standards.
Family Type: * Single Person under 55 with no childre
Other Household Members: Adults: Children (Under 16):
Previous History of Tenancy Support: Yes No
Advocates and Other Relevant Services Working With Household: Yes No
Tenancy Risk Assessment. Are there any worker safety concerns and/or key details? Yes No
If yes, please provide details (s):
Matrix Template: Public Housing
INITIAL MATRIX
Payments 3 TAKE ACTION
Going Away 5 ALL GOOD
Home 2 ACTION NEEDED URGENTLY
Yard 2 ACTION NEEDED URGENTLY
Tenant and Household 1 LAST CHANCE
Visitors 1 LAST CHANCE
Total Score: 14
Ready for Management Approval: Ready For Management Approval

Log – Comments

To add a Log, click on the 'Add New' button.



Select the Log Type from the drop-down option; complete the date and Log Comments.



The types of actions can be logged are:

Option	Description
Phone Call – Client	Phone call with the client.
Phone Call Missed - Client	Unsuccessful attempt to contact the client by phone
Phone Call - Other	Phone call to other parties
Meeting - Client	Meeting with the client
Meeting Missed – Client	Unsuccessful attempt to meet the client
Meeting - Client and Housing	Meeting with the client and the Housing Officer
Meeting Missed - Client and Housing	When the client did not attend a meeting with the Service Provider and the Housing Officer
Meeting - Client and Other	When the client attended a meeting with the Service Provider and other agency e.g. Centrelink

Meeting Missed - Client and Other	When the client did not attended a meeting with the Service Provider and other agency e.g. Centrelink
Meeting - Housing	Meeting between Service Provider and Housing that was not attended (not used for Six Weekly Meeting)
Meeting Missed - Housing	Meeting cancelled between Service Provider and Housing (not used for Six Weekly Meeting)
Letter – Client	When a letter is sent to the client
Letter – Housing	When a letter is sent to Housing
Meeting - Six Weekly Meeting	When the Six Weekly Meeting is scheduled/Outcome of the Six Weekly Meeting
General	All other actions.
Brokerage	When there is need to purchase goods/services to support the client in meeting their goals; provision of material assistance for the purchase of essential goods; removalists and storage and/or specialist services that are not offered by the agency or available from a free service e.g. counselling; family mediation; mental health and psychiatric services; occasional childcare etc.

To record a log, select a 'Log Type' and then record the date of the action in the 'Date' field (which can be backdated). Use the Log/Comments/Outcome:' to provide further details. Once you have completed your Log, save the record.

After a log comment is entered, save the record.

Log comments can be locked by clicking on the 'Lock' box. Once locked, the log ***cannot*** be updated further.

Note: Irrespective of when the log was entered, it will be sorted by the log date, not by the date it was entered into the system.

A log comment can be deleted within 24 hours of the log being recorded. This should only be used when it is entered onto an incorrect case.

The ‘History of Changes’ field allows you to view a history of each Log.

Hint: *A limited number of Logs can only be seen at a time – use the scroll bar on the right if you wish you view all the Logs.*

Program – Post Exit Review

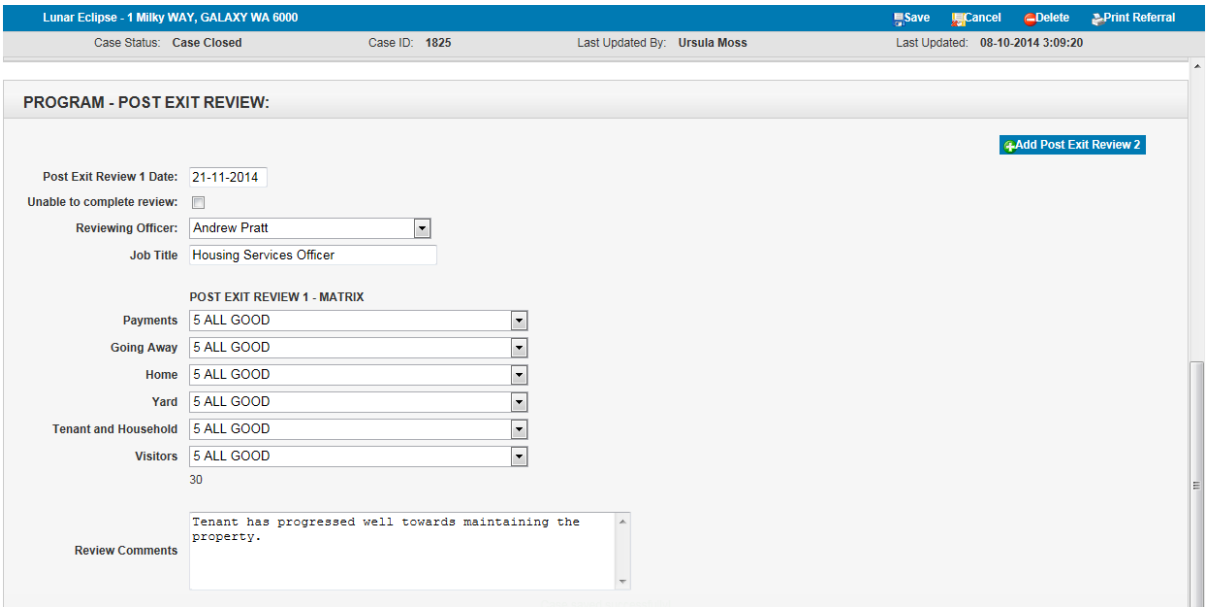
Post Exit Reviews must be completed by the *Housing Services Officer* and these should be completed 3 and 6 months following the Tenant’s exit from STEP.

In order to complete the *Post Exit Review* the *Housing Services Officer* will need to:

- *Conduct a Property Inspection* to record property standards
- *Talk to the Tenant* regarding their progress
- Record the tenant’s *Keeping My Home Matrix* scores.

To record the *Post Exit Review* click on

which will display the screen below. If the *Post Exit Review* was unable to be completed tick the *Unable to complete review* box and write the reason in *Review Comments.*


Lunar Eclipse - 1 Milky WAY, GALAXY WA 6000
Save
Cancel
Delete
Print Referral
Case Status: Case Closed
Case ID: 1825
Last Updated By: Ursula Moss
Last Updated: 08-10-2014 3:09:20
PROGRAM - POST EXIT REVIEW:
Add Post Exit Review 2
Post Exit Review 1 Date: 21-11-2014
Unable to complete review:
Reviewing Officer: Andrew Pratt
Job Title Housing Services Officer
POST EXIT REVIEW 1 - MATRIX
Payments 5 ALL GOOD
Going Away 5 ALL GOOD
Home 5 ALL GOOD
Yard 5 ALL GOOD
Tenant and Household 5 ALL GOOD
Visitors 5 ALL GOOD
30
Review Comments
Tenant has progressed well towards maintaining the property.

Similarly, record the *Post Exit Review* 2 at 6 months. If the *Post Exit Review* was unable to be completed tick the *Unable to complete review* box and write the reason in *Review Comments.*

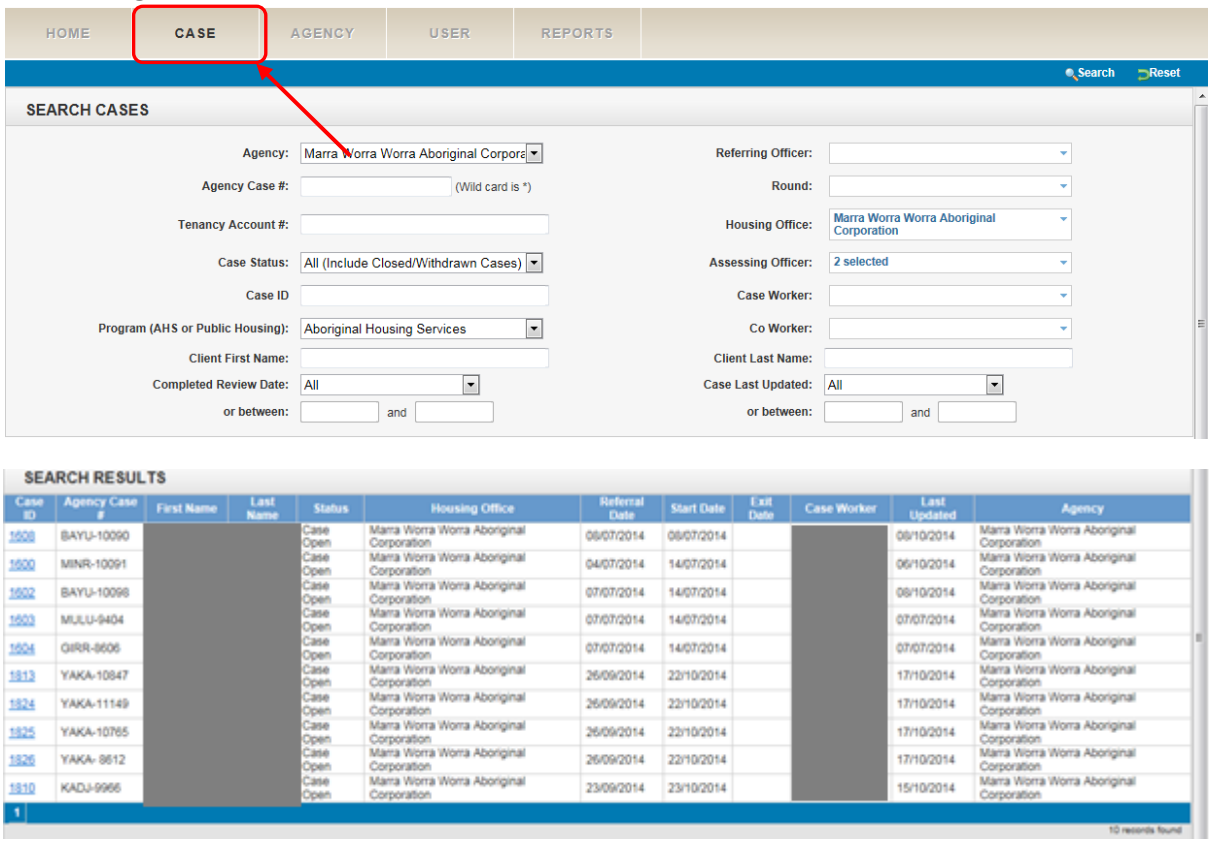
HOUSING CASE ENQUIRY ACCESS

Housing Case Enquiry users have read only access with no ability to update records. This is designed for Administration and/or Reception staff.

HOME – Menu Option

For user with Housing Case Enquiry access the *Home* page displays the following:

Home Page



CASE - Menu Option

Case – Search

This option allows you to search for cases. You can go directly from the *Search Results* area into the client details screen.

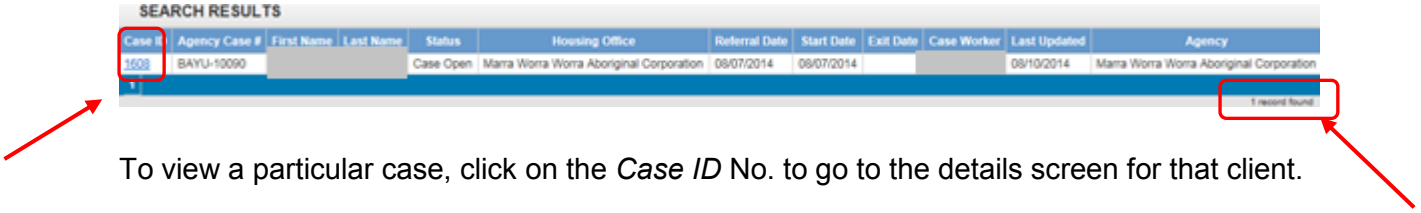
To search, you can enter details in a number of fields and make selections from the drop-down options.
Search criteria may be entered in the following fields:

- *Agency Case #*
- *Tenancy Account #*
- *Case ID*
- *Client First Name*
- *Client Last Name*

Search criteria may be selected from the following drop-down options:

- *Agency*: this field automatically defaults to your agency
- *Case Status*:
    - *All (Active Case Only)*
    - *All (Include Closed/Withdrawn Cases)*
    - *Referral*
    - *Ended at Referral Stage*
    - *Waitlist for Assessment*
    - *Under Assessment*
    - *Ended at Assessment Stage*
    - *Waitlisted*
    - *Case Open*
    - *Case Terminated Early*
    - *Case Closed*
- *Program (AHS or Public Housing)*
    - *All Programs*
    - *Public Housing*
    - *Aboriginal Housing Services*
- *Complete Review Date:*
    - *All*
    - *In Last 10 Days*
    - *In Last 30 Days*
    - *Custom* - select a date range
- *Referring Officer* – Choose from List of Names of Housing Officers or the option to check all officers is available
- *Round* – Choose from a list of Housing Office Round Numbers (A Round is a group of houses covered by a Housing Services Officer) *Only applicable if Direct Managed*
- *Housing Office* – Choose from a List of Housing Offices or the option to check all offices is available
- *Assessing Officer* - Choose from List of Assessing Officers or the option to check all officers is available
- *Case Worker* - Choose from List of Case Workers or the option to check all officers is available
- *Co Worker* – Choose from List of Co Workers or the option to check all officers is available
- *Case Last Updated*
    - *All*
    - *In Last 10 Days*
    - *In Last 30 Days*
    - *Custom* - select a date range

A search may be narrowed by completing as much of the Search Criteria as possible. The results are displayed in the *Search Results* section and are listed in *Status* order (i.e. Referral; Waitlist for Assessment etc).



To view a particular case, click on the *Case ID* No. to go to the details screen for that client.

Information on the *Case Details* screen is covered in a later section of this guide.

The number(s) in the bottom left corner of the screen (in the blue banner) indicates the number of pages found; 15 records per page are displayed at a time. The number in the bottom right corner of the screen (in the grey banner) shows the total number of cases that met the search criteria.

Hint: The *Reset* button removes any existing search criteria so you can start again.

Note: By default, inactive cases (clients who have exited the program and referrals that were withdrawn/not accepted) do not display in the *Search Results* unless the "*All (Include Closed/Withdrawn Cases)"* is selected from the *Case Status* drop-down option.

ADMINISTRATOR ACCESS

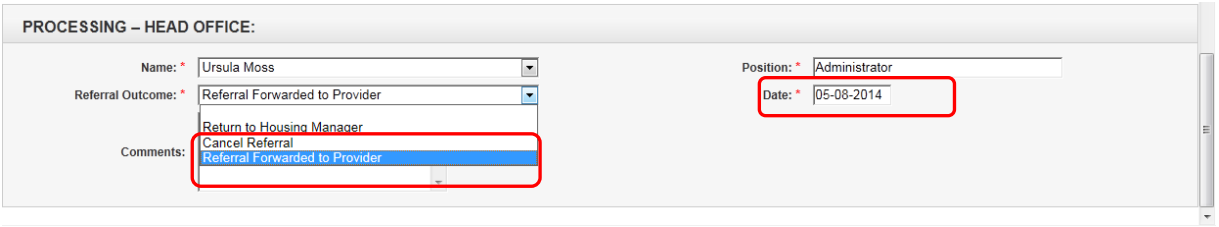
Administrator access users have access to all functionality of STEPIMS.

HOME – Menu Option
Please refer to the *Housing Manager* access instructions

CASE – Menu Option
Please refer to the *Housing Manager* access instructions.

To Process Referrals please refer to instructions below:
Processing – Head Office
The Relationships and Agreements Business Unit will process the referral and it will be sent electronically to the Service Provider.

If the referral is returned or cancelled, an explanation will be provided in the Comments field.



AGENCY - Menu Option
Please refer to the *Housing ICT* access instructions.

USER – Menu Option
Please refer to the *Housing ICT* access instructions.

REPORTS – Menu Option
Please refer to the *Housing Manager* access instructions.

ADMINISTRATOR REPORTS AVAILABLE

The following table provides a description for each report that Administrators can produced:

Report Title	Report Description
Active Cases Report	A detailed summary of *Open Cases* and cases *Under Assessment*.
Agency List (Unformatted)	List of agencies details and agencies logos.
Agency Periodic or Annual Report	Report for the purpose of the 6 monthly and annual reporting, including current case status, completed case outcomes and total case equivalents.
Case File Note	Ability to print log comments for a case. Only available for printing within the case.
Case List (Unformatted)	A spreadsheet containing raw data of each case on STEPIMS.
Case List Referral Reasons (Unformatted)	A spreadsheet containing the referral reasons for each case.
Case Overview Report	A snapshot of the current status of all cases in a financial year.
Closed Cases	An overview of the outcome of the cases closed or terminated early within a date range.
Exit Form Report	Ability to print an Exit Form for a case. Only available for printing within the case.
Log Comment List (Unformatted)	A spreadsheet containing all case log comments.
Referral Report	Details of all cases currently in Proposed Referral, Referral, Waitlist for Assessment or Waitlist status.
Referral Report Details	Ability to print Referral Form for a case. Only available for printing within the case.
Reviews and Closures	Cases where the Next Review Date or Expected End Date is within the date range entered. Please note, this report does not indicate if a review has been completed or is overdue.
User List (Unformatted)	List of STEPIMS users associated with the agency/housing office.

TAILORED GUIDES AVAILABLE

Tailored User Guides are available specifically for the positions of;

Housing Manager
Housing Officer
Housing Case Enquiry

Tenancy Support Manager
Tenancy Support Case Worker
Tenancy Case Enquiry

Please email AHS-PTM@housing.wa.gov.au to request.